THE REPORT ON INTERNATIONAL STUDENTS IN MANITOBA 2000/01

FINDINGS IN BRIEF

Manitoba
Building for the Future

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Section I

INTERNATIONAL STUDENTS IN MANITOBA 2000/01
INTRODUCTION

In the 2000/01 academic year, over 3,700 international students came to Manitoba to pursue their studies. The total estimated amount of tuition and academic fees paid by these students exceeded $14 million. If the non-academic spending of these students is included, their total economic impact surpassed $35 million. Furthermore, Manitoba's educational institutions indicate that they could accommodate almost twice the number of international students already enrolled.

International students add enormous value to the classrooms, campuses and communities of the province. Through interaction with international students, Manitobans increase their cross-cultural understanding and global awareness. When international students return home, they help to raise Manitoba's profile abroad. Upon completion of their studies, some international students choose to remain in Manitoba and contribute their much needed skills and energy.

International students can be found in Manitoba's elementary and secondary schools, post-secondary institutions and English as a Second Language programs. This report looks at the numbers of international students in these three sectors in 2000/01, their areas of study, countries of origin and lengths of stay. It also examines the capacity of educational institutions to admit more international students and the economic impact of international students on the province.

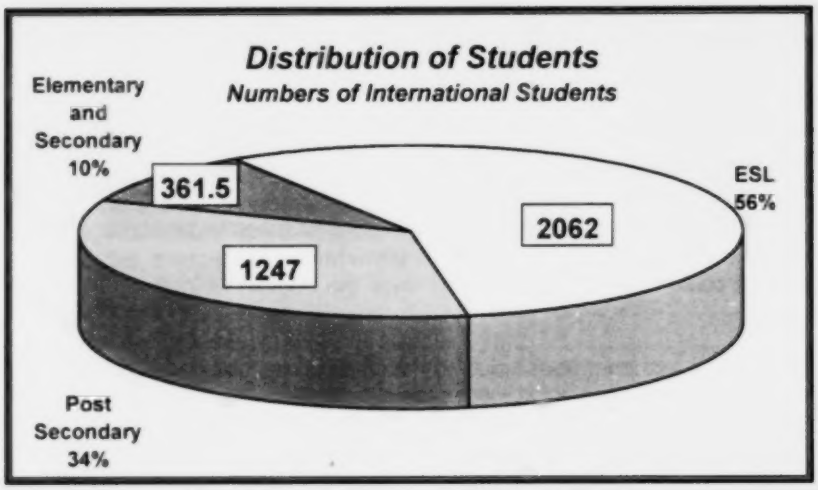
The survey of the international activities was widely circulated to Manitoba's educational institutions. Institutions were asked to provide information voluntarily. Some institutions provided partial data and others indicated that certain portions of the survey were not applicable to their international activities. Where no data was provided, the institution was excluded from the corresponding tables and charts.

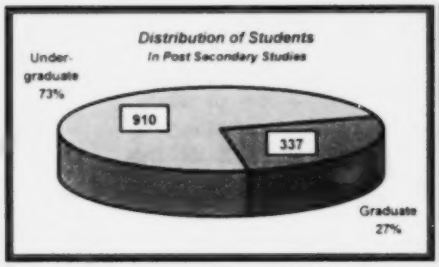
This is a summary of the complete report. Detailed/complete versions can be obtained from the following:

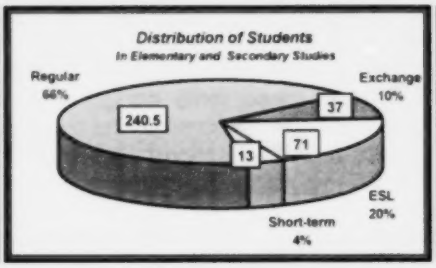
International Education Branch
Manitoba Education and Youth
Manitoba Advanced Education and Training
330-800 Portage Avenue
Winnipeg, Manitoba R3G 0N4
CANADA

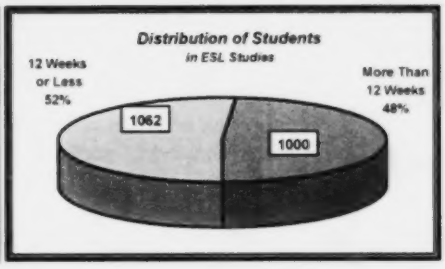
This report complies with the legal requirements set out by the Freedom of Information and Protection of Privacy Act.

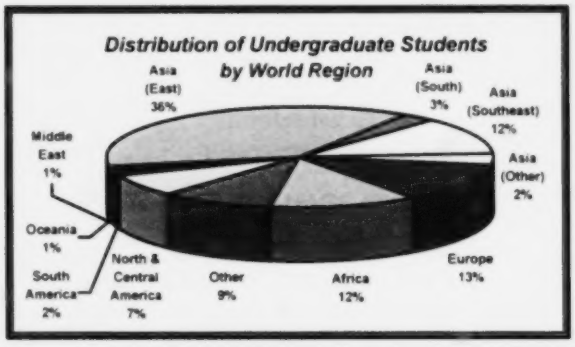
REPORT AT A GLANCE

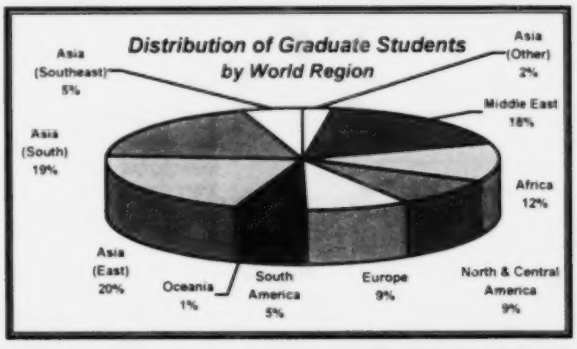


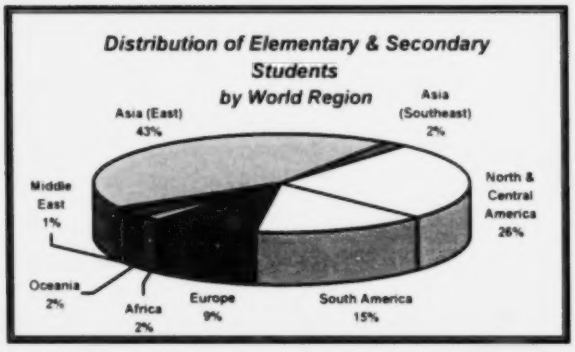


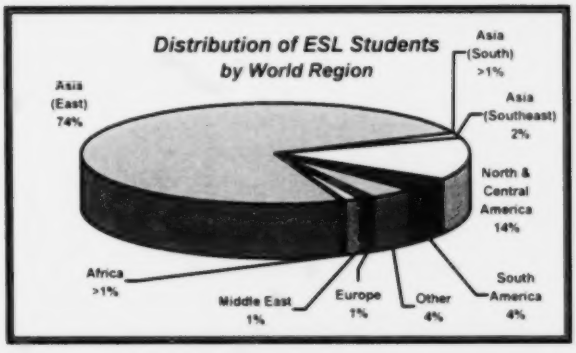


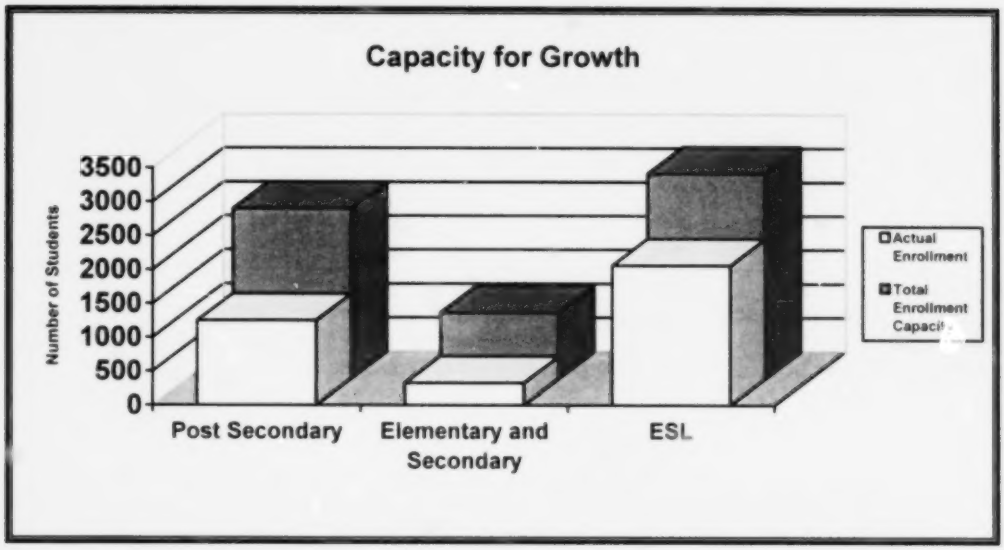


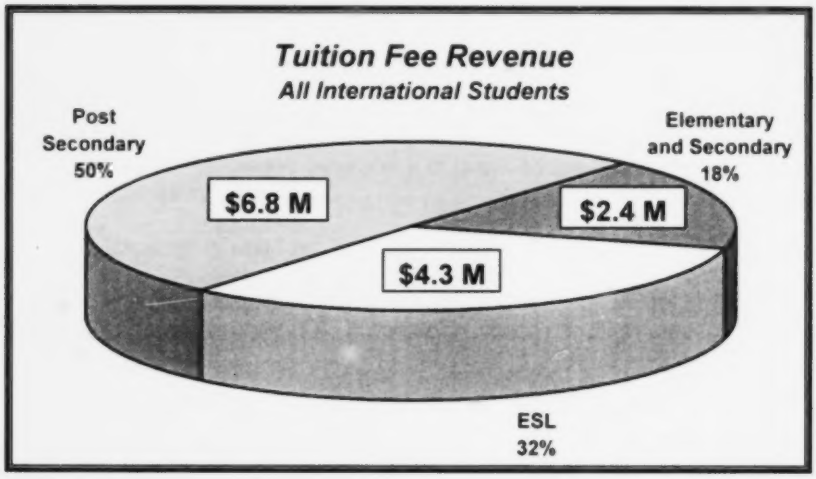


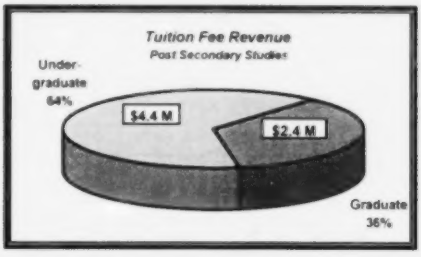


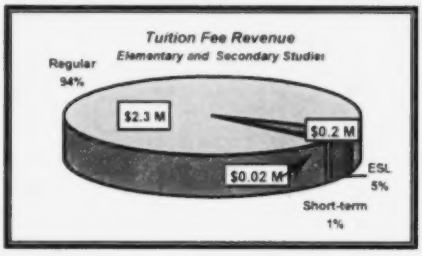


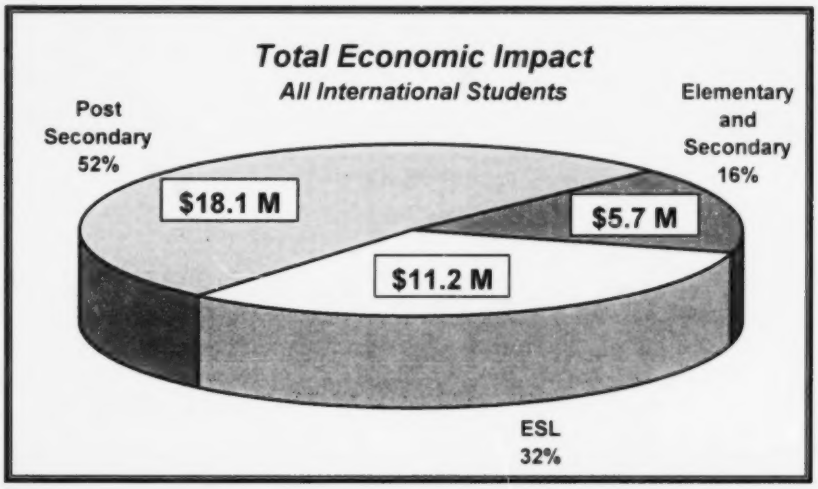



Capacity for Growth
Number of Students
3500
3000
2500
2000
1500
1000
500
0
Post Secondary
Elementary and Secondary
ESL
Actual Enrollment
Total Enrollment Capaci


Tuition Fee Revenue
All International Students
Post Secondary 50%
Elementary and Secondary 18%
ESL 32%
$6.8 M
$2.4 M
$4.3 M


Tuition Fee Revenue
Post Secondary Studies
Under-graduate 64%
$4.4 M
$2.4 M
Graduate 36%


Tuition Fee Revenue
Elementary and Secondary Studies
Regular 94%
$2.3 M
$0.2 M
$0.02 M
ESL 5%
Short-term 1%


Total Economic Impact
All International Students
Post Secondary 52%
Elementary and Secondary 16%
ESL 32%
$18.1 M
$5.7 M
$11.2 M

Section II

THE POST SECONDARY SECTOR
UNIVERSITIES AND COLLEGES

Universities were asked to provide information on undergraduate students, graduate students, exchange and other non-fee paying students. Colleges were asked for data on regular program students, short-term students, exchange and other non-fee paying students, and contract-training students. Both types of institutions were asked for student head counts and FTEs, or Full Time Equivalents.

Both colleges and universities were also asked to provide definitions for their academic year, semesters/terms, and FTEs. This information was used to check the compatibility of the data in order to ensure accurate and appropriate statistical comparisons.

The section on POTENTIAL CAPACITY looks at the ability of colleges and universities to enroll more students. This serves as a key indicator for future growth in international education.

Estimating capacity is a complex task based on many variables including program flexibility, types of courses taught, availability of qualified teachers and professors, and sufficient physical space and infrastructure.

Capacity is used as an institution-wide term in this context – breakdowns of specific faculties or programs are not examined. The report focuses on institutions' success in reaching their estimated capacity to immediately enroll international students. It does not focus on their ability to further expand their theoretical capacity through medium- and long-term measures.

Universities and colleges were asked to provide the costs of tuition, accommodation, and all related fees charged to international students. Some of the information has been averaged and used to calculate approximate revenue for each of the institutions in the section on STUDENT FEES AND ECONOMIC IMPACT.

This data, along with estimated student expenditures, was used to assess the amount of money that international students inject into the provincial economy.

Ungergraduate Students
by Institution and Country of Origin

	BU	CMU	CUSB	CUSB-ETP	PC&S	RRC	UM	UW	TOTAL
Africa									**116**
Botswana						8			8
Cameroon	2			1					3
Ghana	6			1		5	2		14
Kenya						15	1		16
Malawi	1								1
Mali		5	8						13
Morocco			8						8
Mozambique						10			10
Nigeria	4					3			7
South Africa	3					6			9
Tanzania	1								1
Uganda							2		2
Zambia							1		1
Zimbabwe						4	1		5
Other		10				8			18
Asia									**522**
East Asia									***348***
China	12					32	9		53
Hong Kong				2		75	63		140
Japan	2					32	9		43
South Korea	3	5				35	2		45
North Korea							1		1
Macao, China							2		2
Taiwan	24					28	12		64
South Asia									***27***
Bangladesh	2						1		3
India	2			1		12			15
Pakistan	3					6			9
Southeast Asia									***111***
Indonesia	1					12	2		15
Malaysia				1		82	9		92
Singapore							1		1
Thailand							1		1
Vietnam							2		2
Other (Asia)									**36**
Other						14	22		36

Figure 1

(continued on next page)

Institutional Abbreviations

BU – Brandon University
CMU – Canadian Mennonite University
CUSB – Collège universitaire de Saint-Boniface
CUSB-ETP – L'École technique et professionnelle
PC&S – Providence College & Seminary
RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

	BU	CMU	CUSB	CUSB-ETP	PC&S	RRC	UM	UW	TOTAL
Europe									**118**
Albania	1								1
Belarus								1	1
Denmark							3		3
England	1								1
France			7	13			15	1	36
Germany	4	1			2		11	2	20
Greece								2	2
Hungary	2								2
Iceland							3		3
Italy								1	1
Lithuania		4						4	8
Netherlands							7		7
Poland								1	1
Portugal							4	1	5
Russia	2								2
Spain								1	1
Turkey								1	1
Ukraine		1					4		5
United Kingdom							4	3	7
Other							11		11
Middle East									**10**
Iran	1						4		5
Saudi Arabia								1	1
Syria	1								1
Other							3		3
North & Central America									**68**
Bahamas	1								1
Belize								1	1
Br. West Indies	1								1
Jamaica	1							4	5
Mexico							11		11
St. Lucia	1								1
Trinidad & Tobago							4	3	7
United States	6						24	8	38
Other							3		3
Oceania									**5**
Australia	1						4		5
South America									**15**
Argentina								1	1
Brazil	2							1	3
Colombia							3	1	4
Paraguay		2							2
Other							5		5
Other									**56**
Other			5	3		48			56
TOTAL	**91**	**13**	**27**	**32**	**8**	**48**	**510**	**181**	**910**

Figure 1

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Ungergraduate Students

by Discipine of Study

	BU	CMU	CUSB	CUSB-ETP	PC&S	RRC	UM	UW	TOTAL
Agriculture									**13**
Agriculture & Food Sciences (Degree)						12			12
Agriculture & Food Sciences (Diploma)						1			1
Arts (Humanities & Social Sciences)									**138**
Arts	10	5	4			51			70
Economics	1						36		37
English							3		3
Geography	1						6		7
International Development Studies							3		3
Political Science							6		6
Psychology	2						6		8
Sociology	1						3		4
Business, Commerce, & Management									**223**
Administrative Studies							28		28
Business Administration	11			12	2				25
Business Computing							58		58
Business and Applied Arts					22				22
Commerce			1						1
Management						89			89
Continuing Education									**42**
Academic Development Programs					8				8
Continuing Education						34			34
Education									**7**
Education						5			5
TESOL				2					2
Engineering and Architecture									**82**
Architecture						5			5
Engineering						77			77
Information Technology									**18**
Computer Science	9								9
Multimedia communications			3						3
Systems Analyst			6						6
Health Sciences									**19**
Health & Applied Sciences					11				11
Nursing & Mental Health	1					7			8
Music & Fine Arts									**24**
Church Music				2					2
Music		1				5			6
Theatre & Drama							6		6
School of Art						10			10
Sciences									**145**
Chemistry							6		6
Geology	1								1
Mathematics	3						17		20
Physics							3		3
Science	22		3			89			114
Zoology	1								1

Figure 2

(continued on next page)

Institutional Abbreviations

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	BU	CMU	CUSB	CUSB-ETP	PC&S	RRC	UM	UW	TOTAL
University One*									**122**
University One			15				107		122
Other									**77**
Christian Studies		7							7
General Studies	5								5
Human Ecology							4		4
Industrial Technologies						7			7
Intercultural					2				2
Nil Degree**	23								23
Phys. Ed. & Rec							3		3
Other			4	11			11		26
TOTAL	**91**	**13**	**27**	**32**	**8**	**48**	**510**	**181**	**910**

Figure 2

*University One is the U of M's first year program for new students.

**Nil Degree is listed for students who take courses but do not intend to complete a degree at BU.

Data from UW was based on information received on 64 of 172 students. On the advice of the UW International Office, this has been used as a representative sample to extrapolate the numbers for the entire group of 181. Likewise, ratios were used to extrapolate data from BU with the exception of some students whose discipline of study was listed.

Approximately 75 – 80 exchange students are included in the figures provided here by UM as they are not tracked separately.

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Graduate Students

Graduate Students
by Institution and Country of Origin

	BU	PC&S	UM	
Africa				**41**
Botswana			3	3
Egypt			4	4
Ghana			3	3
Libya			10	10
Nigeria			8	8
South Africa	1		3	4
Sudan		1		1
Other			8	8
Asia				**158**
East Asia				***69***
China			40	40
Hong Kong			5	5
Japan	1			1
South Korea		9	14	23
South Asia				***64***
Bangladesh			4	4
India		1	41	42
Pakistan		1	9	10
Sri Lanka			8	8
Southeast Asia				***17***
Malaysia			12	12
Philippines		1		1
Thailand			4	4
Other				***8***
Other			8	8
Europe				**29**
France			5	5
Germany		1	3	4
Ukraine		1	4	5
Other			15	15
Middle East				**59**
Iran			7	7
Kuwait			5	5
Saudi Arabia			45	45
Other			2	2
North & Central America				**30**
Trinidad & Tobago			3	3
United States	2		18	20
Other			7	7
Oceania				**2**
Other			2	2
South America				**18**
Argentina			4	4
Brazil		1	4	5
Colombia			5	5
Paraguay		1		1
Other			3	3
TOTAL	**4**	**17**	**316**	**337**

Figure 3

Institutional Abbreviations

BU – Brandon University
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RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

Graduate Students
by Discipine of Study

	BU	PC&S	UM	TOTAL
Agriculture				**26**
Agriculture and Food Sciences			26	26
Arts (Humanities & Social Sciences)				**40**
Arts			34	34
Rural Development	2			2
Social Work			4	4
Education				**9**
Education	2		7	9
Engineering and Architecture				**93**
Architecture			12	12
Engineering			81	81
Health Sciences				**23**
Dentistry			2	2
Medical Rehabilitation			1	1
Medicine			19	19
Pharmacy			4	4
Management				**13**
Management			13	13
Post Graduage Medical Education				**60**
Post Graduage Medical Education*			60	60
Sciences				**39**
Natural Resources Institute			2	2
Science			37	37
Other				**31**
Graduate Studies			5	5
Human Ecology			5	5
Law			2	2
Physical Education and Recreation Studies			2	2
Other**		17		17
TOTAL	**4**	**17**	**316**	**337**

Figure 4

*Most Post Graduate Medical Education (PGME) students are from Saudi Arabia. They study at UM under group contracts.

**PC&S offers Master's studies in Divinity and Arts and a Ministry Doctorate. A breakdown of the numbers of students taking each of these programs was not provided so they are listed as "Other."

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Overall Potential Capacity

	Actual Enrollment (x)	Additional Capacity (y)	Percent of Theoretical Maximum Achieved (x/(x+y))
BU	95	300	24%
CMU	13	20	39%
CUSB	27	27	50%
CUSB-ETP	32	32	50%
PC&S	25	55	31%
RRC	48	25	66%
UM	826	1574	34%
UW	181	469	28%
TOTAL	**1247**	**2502**	**33%**

Figure 5

Some institutions provided a breakdown of their estimated capacity on a program by program basis. For the purposes of these analyses, all numbers, regardless of type of capacity, have been combined.

Where estimated capacity was provided as a range, the range was averaged. In other instances, criteria affecting capacity were provided and not actual numbers – in these instances, the number of spaces was estimated based on the criteria provided.

It is important to exercise caution in interpreting this data. Note that while it is important for institutions who have room for more international students to admit more, it is also important for institutions who have reached their capacity to find ways of accommodating a greater number of international students.

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UW – University of Winnipeg

Overall Average Tuition & Fee Revenue

by Institution

Institution	# of FTEs	Estimated Revenue	% of Total Revenue
BU	95	$516,679.44	7.6%
CMU	13	$73,775.00	1.1%
CUSB	27	$175,500.00	2.6%
CUSB-ETP	32	$144,000.00	2.1%
PC&S	25	$80,850.00	1.2%
RRC	48	$364,800.00	5.3%
UM	708.7	$4,569,531.90	67.0%
UW	163	$895,929.50	13.1%
TOTAL	**1,111.7**	**$6,821,065.84**	**100.0%**

Figure 6

Manitoba colleges and universities generated $6.8 million of revenue from 1,111.7 students/FTEs.

Where ranges for tuition or fees were given, an average was used. Tuition from UM was based on the averaged cost of a credit hour from Arts, Science, and Education. UM Post Graduate Medical Education (PGME) students were calculated separately because of their higher tuition fees – they are set out under contracts with international partners.

The numbers include tuition and charges related to academics (such as mandatory library fees or application fees). They do not include accommodation fees, insurance costs, student union dues, and the like.

The calculations are based on the number of FTEs per institution. Where FTEs were not provided, student numbers were used.

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UW – University of Winnipeg

Estimated Economic Impact		
A	Number of Students/FTEs*	1,111.7
B	Estimated Length of Study	8 months
C	Monthly Student Spending**	$1,100.00
D	Total Student Spending (A x B x C)	$9,782,960.00
E	Total Tuition Fee Revenue	$6,821,065.84
F	Total Economic Impact (D + E)	$16,604,025.84
G	Direct Value-Added Multiplier***	1.09
H	**TOTAL VALUE-ADDED ECONOMIC IMPACT**	**$18,098,388.17**

Figure 7

*Calculations are based on the number of FTEs per institution. Where FTEs were not provided, student numbers were used.

**Includes estimates of average spending on accommodation, food, clothing, transportation, entertainment, and miscellaneous incidentals.

***Value-added measurement of impact is calculated using a ratio of 1.09, meaning that for every dollar spent by an international student, there is a $1.09 impact on the province. This approach is used to measure other sectors of Manitoba's economy and is in use in other provinces to measure one form of the economic impact of international students.

Section III

THE ELEMENTARY AND SECONDARY SECTOR
SCHOOLS AND SCHOOL DIVISIONS

Schools and school divisions were asked to provide information on regular fee-paying students, exchange students, other non-fee paying students, ESL (English as a Second Language) students, and short-term study students.

Schools/divisions were also asked to provide definitions for their semesters or terms to check the compatibility of the data in order to ensure accurate and appropriate statistical comparisons.

Throughout this section, there are references to the "elementary and secondary" education system. This term is used to describe the education students receive from Grades 1 – 12. These grades are divided into three major components: the Early Years (Grades 1 – 4), the Middle Years (Grades 5 – 8), and the Senior Years (Grades 9 – 12). The report also provides more detail of the Senior Years by showing Senior 1 (Grade 9), Senior 2 (Grade 10), Senior 3 (Grade 11), and Senior 4 (Grade 12).

The ability of schools/divisions to admit more students than are currently enrolled provides a key indicator by which to gauge Manitoba's capacity for growth in the international education sector. This is examined in the section on POTENTIAL CAPACITY.

Estimating student capacity is a complex task based on many variables including program flexibility, types of courses taught, availability of qualified teachers, and sufficient physical space and infrastructure.

Institutions were asked to assess their potential ability to admit more international students into their programs. This data was then evaluated against their actual international student enrollment to determine their total theoretical capacity and their success in reaching that theoretical capacity.

Schools/Divisions were asked to provide the costs of tuition, accommodation, and all related fees charged to international students. Some of the information has been averaged and used to calculate approximate revenue for each of the institutions in the section on STUDENT FEES AND ECONOMIC IMPACT.

This data, along with estimated student expenditures, was used to assess the amount of money that international students inject into the provincial economy.

Regular International Students (Consolidated)

Consolidated Data on Regular Students Enrollments
by School/Division and Level of Study

	Early	Middle	Senior 1	Senior 2	Senior 3	Senior 4	Total
Antler River						1	**1**
Balmoral Hall		10	1.5	11	6.5	3	**32**
Fort Garry		2	3	5.5	21.5	33.5	**65.5**
Garden Valley				1	2	1	**4**
Interlake					3	8	**11**
Lakeshore			1	3	3	1	**8**
Lord Selkirk				2		1	**3**
River East				2.5	7.5	5	**15**
St. James-Assiniboia	0.5	2.5	0	2.5	14	12	**31.5**
St. John's Ravenscourt		1	3	3	12	2	**21**
St. Vital				0.5			**0.5**
Souris Valley		1		1	2	2	**6**
UW Collegiate					10	32	**42**
TOTAL	**0.5**	**16.5**	**8.5**	**32**	**81.5**	**101.5**	**240.5**

Figure 8

In order to arrive at these consolidated figures, students enrolled for one semester/term/half-year were multiplied by a factor of ½ to create a rough comparison between these students and the one-year students.

The term "Regular International Students" refers to fee-paying students studying the Manitoba curriculum who cannot be classified as exchange students, ESL students, or short-term students.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations:

Balmoral Hall – Balmoral Hall School
St. James – St. James-Assiniboia (School Division)
St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

Consolidated Data on Regular Student Enrollments
by School/Division and Country of Origin

	Antler River	Balmoral Hall	Fort Garry	Garden Valley	Interlake	Lakeshore	Lord Selkirk	River East	St. James	St. John's	St. Vital	Souris Valley	UW Collegiate	TOTAL
Africa														**5**
Ghana							1							1
Zambia												4		4
Asia														**107.5**
East Asia														***102.5***
China	1	6.5							1					8.5
Hong Kong	6	7				1	2.5	1	1			12		30.5
Japan	1.5	6		4			3.5							15
South Korea	2.5	12						0.5	9	0.5		2		26.5
Taiwan		9.5						1.5				11		22
Southeast Asia														**5**
Indonesia		1												1
Malaysia												1		1
Singapore							1							1
Thailand	1													1
Vietnam												1		1
Europe														**21.5**
Austria									1					1
Belgium	1													1
France			1											1
Germany			3	2			3		5			1		14
Latvia				1										1
Russia	2								1					3
Turkey								0.5						0.5
Middle East														**3**
Saudi Arabia	1								2					3
North & Central America														**62**
Br. West Indies	1													1
Mexico	13	16.5			8	1	4	5.5			6	3		58
Trinidad												2		2
USA												1		1
Oceania														**5**
Australia	1			4										5
South America														**36**
Brazil		7				1		22.5				4		34.5
Columbia							0.5							0.5
Guyana									1					1
TOTAL	**1**	**31**	**65.5**	**4**	**11**	**8**	**3**	**15.5**	**31.5**	**21**	**0.5**	**6**	**42**	**240**

Figure 9

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School

St. James – St. James-Assiniboia (School Division)

St. John's – St. John's-Ravenscourt School

UW Collegiate – University of Winnipeg Collegiate

ESL Students Enrolled for Twelve Weeks or Less
by School/Division and Country of Origin

	Balmoral Hall	Fort Garry	Garden Valley	St. Vital	TOTAL
Asia					**61**
Hong Kong		2			2
Japan	6	50		2	58
Korea		1			1
Europe					**2**
Germany			1		1
Switzerland		1			1
TOTAL	**6**	**54**	**1**	**2**	**63**

Figure 10

Most of these students (52 out of 63 or 82.5%) were the product of partnership arrangements with foreign schools.

ESL Students Enrolled for More Than Twelve Weeks
by School/Division and Country of Origin

	Lakeshore	TOTAL
North & Central America		**8**
Mexico	8	8
TOTAL	**8**	**8**

Figure 11

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
St. James – St. James-Assiniboia (School Division)
St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

Overall Potential Capacity

	Grades															
	Early			Middle			Senior 1 - 4			ESL			Short-term			Total
	x	y	z	x	y	z	x	y	z	x	y	z	x	y	z	
Antler River	-	-	-	-	-	-	1	3	25%	-	-	-	-	-	-	25%
Balmoral Hall	-	-	-	10	65	13%	22	-	100%	6	-	100%	-	-	-	37%
Fort Garry	-	5	0%	2	10	17%	63.5	10	86%	54	20	73%	7	20	26%	66%
Fort La Bosse	-	-	-	-	-	-	-	20	0%	-	-	-	-	-	-	0%
Garden Valley	-	-	-	-	-	-	4	-	100%	1	-	100%	-	-	-	100%
Interlake	-	-	-	-	-	-	11	15	42%	-	-	-	-	-	-	42%
Kelsey	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Lakeshore	-	-	-	-	-	-	8	10	44%	8	-	100%	-	-	-	62%
Lord Selkirk	-	-	-	-	-	-	3	20	13%	-	-	-	-	40	0%	5%
Midland	-	-	-	-	-	-	-	6	0%	-	-	-	-	-	-	0%
Morris-Macdonald	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
River East	-	-	-	-	20	0%	15	80	16%	-	-	-	6	-	100%	17%
St. James-Assiniboia	0.5	-	100%	2.5	-	100%	28.5	-	100%	-	-	-	-	-	-	100%
St. John's Ravenscourt	-	-	-	1	4	20%	20	21	49%	-	-	-	-	-	-	46%
St. Vital	-	10	0%	-	10	0%	0.5	10	5%	2	-	100%	-	-	-	8%
Souris Valley	-	3	0%	1	3	25%	5	5	50%	-	-	-	-	-	-	35%
Transcona-Springfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Turtle Mountain	-	10	0%	-	10	0%	-	25	0%	-	25	0%	-	-	-	0%
UW Collegiate	-	-		-	-		42	100	30%	-	-		-	-	-	30%
Whiteshell	-	15	0%	-	20	0%	-	30	0%	-	-	-	-	-	-	0%
AVG	0.5	43	1%	16.5	142	10%	223.5	355	39%	71	45	61%	13	60	18%	33%

x = Actual Enrollment
y = Additional Capacity
z = Percent of Theoretical Maximum Achieved – calculated as (x/x+y)

Figure 12

On average, across all grade levels including ESL and Short-term study arrangements, Manitoba is enrolling international students to 33% of its total theoretical capacity (i.e. 324.5 students of a potential total of 969.5).

In the above table, numbers used for Early, Middle, and Senior Years are drawn from the consolidated figures (i.e. they are weighted to reflect length of stay), while numbers used in the ESL and Short-term columns are drawn from unconsolidated figures (i.e. they are not weighted).

An assumption has been made that, where no information has been given on capacity, the additional capacity was assumed to be zero. Where no students were enrolled and no capacity was noted, the division was excluded from analysis.

Note that the calculations reflected in the TOTAL column reflect the percentages of actual numbers.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
St. James – St. James-Assiniboia (School Division)
St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

ESL Students Enrolled for Twelve Weeks or Less

by School Division and Country of Origin

	Balmoral Hall	Fort Garry	Garden Valley	St. Vital	
Asia					**61**
Hong Kong		2			2
Japan	6	50		2	58
Korea		1			1
Europe					**2**
Germany			1		1
Switzerland		1			1
TOTAL	**6**	**54**	**1**	**2**	**63**

Figure 10

Most of these students (52 out of 63 or 82.5%) were the product of partnership arrangements with foreign schools

ESL Students Enrolled for More Than Twelve Weeks

by School Division and Country of Origin

	Lakeshore	
North & Central America		**8**
Mexico	8	8
TOTAL	**8**	**8**

Figure 11

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally used abbreviations: **Balmoral Hall** – Balmoral Hall School; **St. James** – St. James-Assiniboia School Division; **St. John's** – St. John's-Ravenscourt School; **UW Collegiate** – University of Winnipeg Collegiate

Overall Potential Capacity

Grades

	Early			Middle			Senior 1-4			ESL			Short-term			Total
	x	y	z	x	y	z	x	y	z	x	y	z	x	y	z	
Antler River	-	-	-	-	-	-	1	3	25%	-	-	-	-	-	-	25%
Balmoral Hall	-	-	-	10	65	13%	22	-	100%	6	-	100%	-	-	-	37%
Fort Garry	-	5	0%	2	10	17%	63.5	10	86%	54	20	73%	7	20	26%	66%
Fort La Bosse	-	-	-	-	-	-	-	20	0%	-	-	-	-	-	-	0%
Garden Valley	-	-	-	-	-	-	4	-	100%	1	-	100%	-	-	-	100%
Interlake	-	-	-	-	-	-	11	15	42%	-	-	-	-	-	-	42%
Kelsey	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Lakeshore	-	-	-	-	-	-	8	10	44%	8	-	100%	-	-	-	62%
Lord Selkirk	-	-	-	-	-	-	3	20	13%	-	-	-	-	40	0%	5%
Midland	-	-	-	-	-	-	-	6	0%	-	-	-	-	-	-	0%
Morris-Macdonald	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
River East	-	-	-	-	20	0%	15	80	16%	-	-	-	6	-	100%	17%
St. James-Assiniboia	0.5	-	100%	2.5	-	100%	28.5	-	100%	-	-	-	-	-	-	100%
St. John's Ravenscourt	-	-	-	1	4	20%	20	21	49%	-	-	-	-	-	-	46%
St. Vital	-	10	0%	-	10	0%	0.5	10	5%	2	-	100%	-	-	-	8%
Souris Valley	-	3	0%	1	3	25%	5	5	50%	-	-	-	-	-	-	35%
Transcona-Springfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Turtle Mountain	-	10	0%	-	10	0%	-	25	0%	-	25	0%	-	-	-	0%
UW Collegiate	-	-	-	-	-	-	42	100	30%	-	-	-	-	-	-	30%
Whiteshell	-	15	0%	-	20	0%	-	30	0%	-	-	-	-	-	-	0%
AVG	**0.5**	**43**	**1%**	**16.5**	**142**	**10%**	**223.5**	**355**	**39%**	**71**	**45**	**61%**	**13**	**60**	**18%**	**33%**

x = Actual Enrollment
y = Additional Capacity
z = Percent of Theoretical Maximum Achieved – calculated as (x/x+y)

Figure 12

On average, across all grade levels including ESL and Short-term study arrangements, Manitoba is enrolling international students to 33% of its total theoretical capacity (i.e. 324.5 students of a potential total of 969.5).

In the above table, numbers used for Early, Middle, and Senior Years are drawn from the consolidated figures (i.e. they are weighted to reflect length of stay), while numbers used in the ESL and Short-term columns are drawn from unconsolidated figures (i.e. they are not weighted).

An assumption has been made that, where no information has been given on capacity, the additional capacity was assumed to be zero. Where no students were enrolled and no capacity was noted, the division was excluded from analysis.

Note that the calculations reflected in the TOTAL column reflect the percentages of actual numbers.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations: **Balmoral Hall** – Balmoral Hall School; **St. James** – St. James-Assiniboia School Division; **St. John's** – St. John's-Ravenscourt School; **UW Collegiate** – University of Winnipeg Collegiate.

Estimated Tuition & Fee Revenue
by School/Division

Institution	# of Students	Estimated Revenue	% of Overall Revenue
Antler River	1	$0.00	0.0%
Balmoral Hall	40	$507,570.00	21.2%
Fort Garry	152	$754,350.00	31.6%
Fort La Bosse	0	$0.00	0.0%
Garden Valley	5	$115.00	0.0%
Interlake	11	$73,700.00	3.1%
Lakeshore	8	$66,400.00	2.8%
Lord Selkirk	4	$30,000.00	1.3%
River East	24	$156,000.00	6.5%
St. James	44	$315,000.00	13.2%
St. John's	21	$232,491.00	9.7%
St. Vital	3	$6,972.42	0.3%
Souris Valley	6	$48,000.00	2.0%
Turtle Mountain	0	$0.00	0.0%
UW Collegiate	42	$199,500.00	8.3%
Whiteshell	0	$0.00	0.0%
TOTAL	**361**	**$2,390,098.42**	**100.0%**

Figure 13

Where ranges for tuition or fees were given, an average was used.

The numbers include charges related to administrative and participation fees. They do not include accommodation fees, insurance costs, uniform charges, et cetera.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School

St. James – St. James-Assiniboia (School Division)

St. John's – St. John's-Ravenscourt School

UW Collegiate – University of Winnipeg Collegiate

Estimated Economic Impact		
A	Number of Regular International Students (Consolidated)	240.5
B	Estimated Length of Study	10 months
C	Number of ESL and Short-term Students	84
D	Estimated Length of Study	2 months
E	Monthly Student Spending*	$1,100.00
F	Total Student Spending ((A x B + C x D) x E)	$2,830,300.00
G	Total Tuition Fee Revenue	$2,390,098.42
H	Total Economic Impact (F + G)	$5,220,398.42
I	Direct Value-Added Multiplier**	1.09
J	**TOTAL VALUE-ADDED ECONOMIC IMPACT**	**$5,690,234.28**

Figure 14

*Includes estimates of average spending on accommodation, food, clothing, transportation, entertainment, and miscellaneous incidentals.

**Value-added measurement of impact is calculated using a ratio of 1.09, meaning that for every dollar spent by an international student, there is a $1.09 impact on the province. This approach is used to measure other sectors of Manitoba's economy and is in use in other provinces to measure one form of the economic impact of international students.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School

St. James – St. James-Assiniboia (School Division)

St. John's – St. John's-Ravenscourt School

UW Collegiate – University of Winnipeg Collegiate

Section IV

THE LANGUAGE SECTOR
ENGLISH AS A SECOND LANGUAGE SCHOOLS

ESL schools in Manitoba were asked to give information for two categories of students: those who were enrolled for 12 weeks or less (and therefore did not require a Student Authorization) and those that were enrolled for more than 12 weeks (and therefore did require a Student Authorization).

ESL schools were also asked to provide definitions for their academic year, semesters/terms, and the number and type of ESL programs that they operated. This information was used to check the compatibility of the data in order to ensure accurate and appropriate statistical comparisons.

Many students come to Manitoba for the sole purpose of studying English as a Second Language. Many others, however, require ESL training in order to pursue their degree or diploma programs in Manitoba. ESL programs are thus a vital conduit for admitting international students to Manitoba's educational institutions. Knowing the ability of ESL schools to admit more students provides a key indicator by which to gauge Manitoba's capacity for growth in the international education sector. This is examined in the section on POTENTIAL CAPACITY.

Estimating student capacity is a complex task based on many variables including program flexibility, types of courses taught, availability of qualified teachers, and sufficient physical space and infrastructure.

Institutions were asked to assess their potential ability to admit more international ESL students into their programs. This data was then evaluated against their actual international ESL student enrollment to determine their total theoretical capacity and their success in reaching that theoretical capacity.

For the purposes of this sub-section, the report will focus on ESL schools' success in reaching their currently estimated maximum capacity rather than their ability to expand their theoretical capacity.

ESL schools were asked to provide the costs of tuition, accommodation, and all related fees charged to international ESL students. Some of the information has been averaged and used to calculate approximate revenue for each of the institutions in the section on STUDENT FEES AND ECONOMIC IMPACT.

This data, along with estimated student expenditures, was used to estimate the amount of money that international students inject into the provincial economy.

Consolidated Student Numbers

Consolidated Data on ESL Student Enrollments
by ESL School and Country of Origin

	ALC	BU	Heartland	Providence	RRC	UM-ELC	UM-ELS	UW	TOTAL
Africa									**7**
Mali			5						5
Morocco		1							1
Tanzania					1				1
Asia									**1557**
East Asia									***1522***
China		9		1	3	204		90	307
Hong Kong				2				5	7
Japan	32	1	53		6	65	160	90	407
South Korea	142	6	67	12	34	144	130	112	647
Taiwan	2	6	9		1	9	101	26	154
South Asia									***3***
Bangladesh		1							1
Pakistan								1	1
Sri Lanka								1	1
Southeast Asia									***32***
Indonesia					1	7			8
Malaysia						5			5
Thailand					1	4		9	14
Vietnam						5			5
Europe									**29**
Austria					2				2
France								5	5
Germany						4			4
Poland			4		1				5
Portugal					1				1
Russia						2		1	3
Turkey						5		1	6
Ukraine						2		1	3
Middle East									**24**
Israel								1	1
Libya								1	1
Saudi Arabia					1	20		1	22
North & Central America									**280**
Cuba								1	1
El Salvador						2			2
Mexico		1	23			23	163	67	277
South America									**85**
Argentina								1	1
Brazil	2		5	1				21	29
Chile								1	1
Columbia						5		2	7
Venezuela								1	1
Other							46		46
Other									**80**
Other			14			32	34		80
TOTAL	**178**	**25**	**180**	**16**	**52**	**538**	**634**	**439**	**2062**

Figure 15

Institutional Abbreviations

ALC – Applied Linguistics Centre

BU – Brandon University

Heartland – Heartland International English School

Providence – Providence College and Seminary

RRC – Red River College

UM-ELC – University of Manitoba English Language Centre

UM-ELS – University of Manitoba English Language Studies

UW – University of Winnipeg English Language Program

Some breakdowns from ALC, Heartland, and UM-ELC are derived all or in part from ratios versus actual numbers. In addition, UM-ELS noted that "each 8-week registration counts as 1 student." Based on this, it should be noted that the numbers used in the following charts will be close, but not identical to, the actual number of students that attended ESL schools under this category.

Where the country of origin is listed as "other" the student origins were either unknown or not provided.

Unlike other sections of this report that analyse consolidated data, the numbers here are not "weighted" to reflect a particular student's length of stay. All students, whether studying for more or less than 12 weeks, are counted in the same way.

Potential Capacity

	Actual Enrollment (x)	Additional Capacity (y)	Percent of Theoretical Maximum Achieved (x/(x+y))
ALC	178	230	44%
BU	25	45	36%
Heartland	180	320	36%
Providence	16	45	26%
RRC	52	20	72%
UM-ELC*	333	117	74%
UM-ELS	634	250	72%
UW	439	50	90%
TOTAL	**1857**	**1077**	**63%**

Figure 16

*UM-ELC provided additional capacity figures only for ESL students studying for twelve weeks or more. As such, ESL students studying for twelve weeks or less were excluded from the Actual Enrollment number.

Some ESL schools provided a breakdown of their estimated capacity on a program by program basis. For the purposes of these analyses, all numbers, regardless of type of ESL capacity, have been combined.

In some cases, estimated capacity was provided as a range – in these cases, the range was averaged and that number was used. In other instances, criteria affecting capacity were provided and not actual numbers – in these instances, the number of spaces was estimated based on the criteria provided.

It is important to exercise caution in interpreting this data. Note that while it is important for institutions who have room for more international students to admit more, it is also important for institutions who have reached their capacity to find ways of accommodating a greater number of international students

Institutional Abbreviations

ALC – Applied Linguistics Centre
BU – Brandon University
Heartland – Heartland International English School
Providence – Providence College and Seminary
RRC – Red River College
UM-ELC – University of Manitoba English Language Centre
UM-ELS – University of Manitoba English Language Studies
UW – University of Winnipeg English Language Program

Student Fees and Economic Impact

Average Tuition & Fee Revenue

by ESL School

Institution	Average Tuition & Fees	# of Students	Approximate Revenue
ALC	$1,900.00	178	$338,200.00
BU	$2,175.75	25	$54,393.75
Heartland	$1,950.00	180	$351,000.00
Providence	$2,530.00	16	$40,480.00
RRC	$2,400.00	52	$124,800.00
UM-ELC	$2,538.00	538	$1,365,444.00
UM-ELS	$2,667.50	634	$1,691,195.00
UW	$1,950.00	439	$856,050.00
TOTAL	**$2,263.91 (AVG)**	**2062**	**$4,821,562.75**

Figure 17

ESL schools were asked to provide data on their international ESL student tuition and all associated fees for each ESL program they offered. Only UM-ELS and UW had tuition and fees that were different for their various programs. All other ESL schools had one fee regime. In the case of UW, the tuition amount used for this section of this report was based on its general ESL program. In the case of UM-ELS, the tuition was based on the costs for each 8-week session; its contract training could not be calculated against enrollment data and was thus excluded. These and other considerations may result in revenue calculations that are lower than institutions' actual revenue.

Where institutions provided yearly or monthly tuition costs, they were pro-rated to their three-month (12-week) equivalent for a more reliable comparison. As mentioned above, the tuition for UM-ELS was based on the averaged costs for each 8-week session; all other are based on 12 weeks.

For the purposes of this report, only tuition and related academic fees were included in the calculations for the averages. Examples of costs that were included are application fees, registration fees and library/student fees. Examples of costs that were excluded are residence and homestay charges, insurance, deposits, and homestay placement fees.

Where a range was provided for tuition and associated fees, the costs were averaged.

Institutional Abbreviations

ALC – Applied Linguistics Centre

BU – Brandon University

Heartland – Heartland International English School

Providence – Providence College and Seminary

RRC – Red River College

UM-ELC – University of Manitoba English Language Centre

UM-ELS – University of Manitoba English Language Studies

UW – University of Winnipeg English Language Program

Estimated Economic Impact

A	Number of Students Enrolled for 12 Weeks*	1,223
B	Estimated Length of Study	3 months
C	Number of Students Enrolled for 8 Weeks	634
D	Estimated Length of Study	2 months
E	Monthly Student Spending**	$1,100.00
F	Total Student Spending ((A x B + C x D) x E)	$5,430,700.00
G	Total Tuition Fee Revenue	$4,821,562.75
H	Total Economic Impact (F + G)	$10,252,262.75
I	Direct Value-Added Multiplier***	1.09
J	**TOTAL VALUE-ADDED ECONOMIC IMPACT**	**$11,174,966.40**

Figure 18

*All students were assumed to study for three months (as shown in Figure 17). Some may have studied for a shorter period of time, but most would have studied for a longer period of time. Students who attended UM-ELS were separated (see lines C and D in Figure 18) because their numbers were provided on the basis of an eight-week study program. Additionally, students from UM-ELC who studied for less than twelve weeks were excluded from the analysis in Figure 18 as it is not known how many would have already been in Manitoba pursuing a parallel course of study (thereby being included in calculations in other sections of this report.) The sum of these factors suggests that the figures arrived at in Figure 18 are likely lower than the actual economic impact.

**Includes estimates of average spending on accommodation, food, clothing, transportation, entertainment, and miscellaneous incidentals.

***Value-added measurement of impact is calculated using a ratio of 1.09, meaning that for every dollar spent by an international student, there is a $1.09 impact on the province. This approach is used to measure other sectors of Manitoba's economy and is in use in other provinces to measure one form of the economic impact of international students.

THE REPORT ON INTERNATIONAL STUDENTS IN MANITOBA 2000/01

Manitoba
Building for the Future

THE REPORT ON INTERNATIONAL STUDENTS IN MANITOBA 2000/01

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      - By Country of Origin 48

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Section I

THE REPORT ON INTERNATIONAL STUDENTS IN MANITOBA 2000/01

INTRODUCTION

INTRODUCTION

In the 2000/01 academic year, over 3,700 international students came to Manitoba to pursue their studies. The total estimated amount of tuition and academic fees paid by these students exceeded $14 million. If the non-academic spending of these students is included, their total economic impact surpassed $35 million. Furthermore, Manitoba's educational institutions indicate that they could accommodate almost twice the number of international students already enrolled.

International students add enormous value to the classrooms, campuses and communities of the province. Through interaction with international students, Manitobans increase their cross-cultural understanding and global awareness. When international students return home, they help to raise Manitoba's profile abroad. Upon completion of their studies, some international students choose to remain in Manitoba and contribute their much needed skills and energy.

International students can be found in Manitoba's elementary and secondary schools, post-secondary institutions and English as a Second Language programs. This report looks at the numbers of international students in these three sectors in 2000/01, their areas of study, countries of origin and lengths of stay. It also examines the capacity of educational institutions to admit more international students and the economic impact of international students on the province.

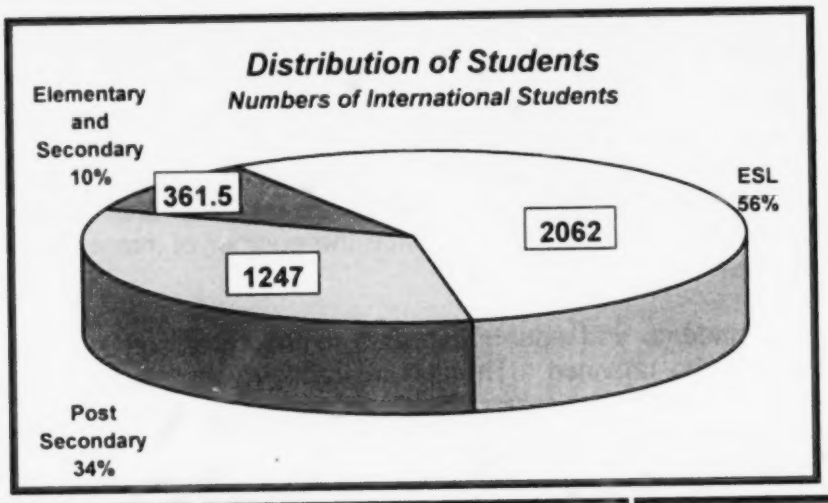
The survey of the international activities was widely circulated to Manitoba's educational institutions. Institutions were asked to provide information voluntarily. Some institutions provided partial data and others indicated that certain portions of the survey were not applicable to their international activities. Where no data was provided, the institution was excluded from the corresponding tables and charts. For a list of participating institutions, please see *Section V*.

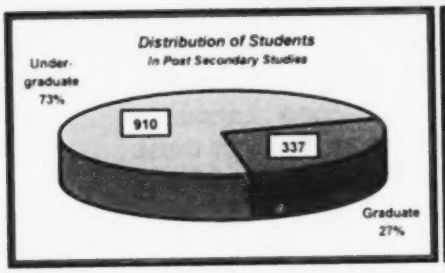
Some sections of the survey were not reported because they were not of primary interest, were too large for inclusion in print, or could not be published because they were of a confidential nature. The omitted sections include:

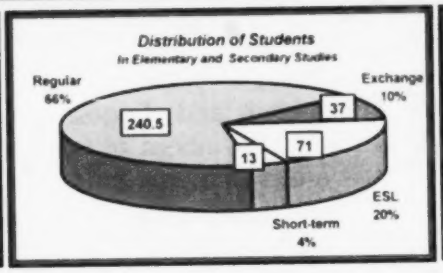
- information on the types of accommodation used by international students and associated costs;
- institutional exchange agreements and other international agreements;
- past and future student recruitment efforts including target countries and methods of recruitment.

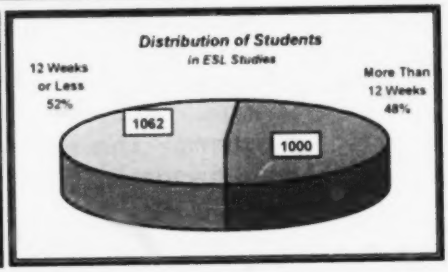
This report complies with the legal requirements set out by the Freedom of Information and Protection of Privacy Act.

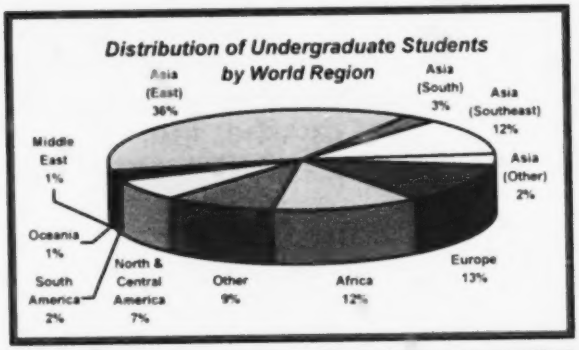
REPORT AT A GLANCE

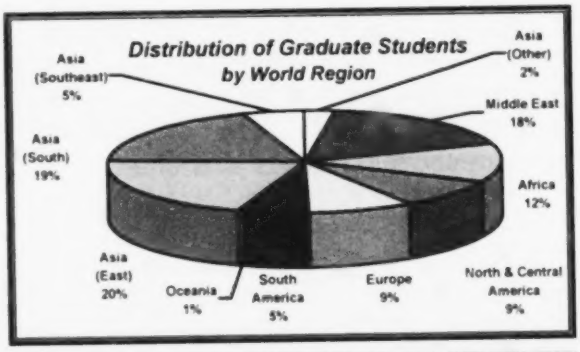


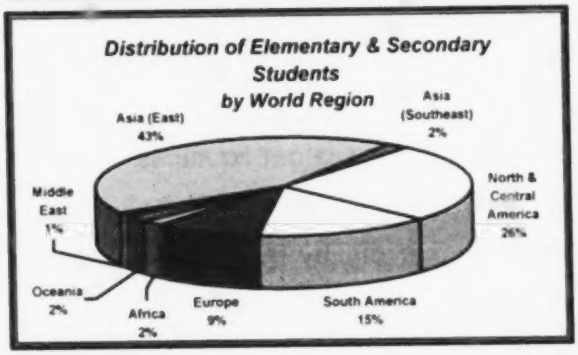


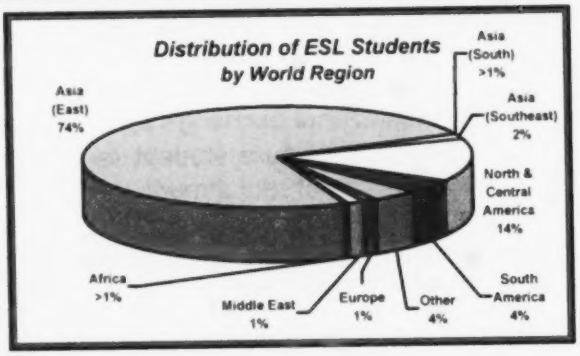


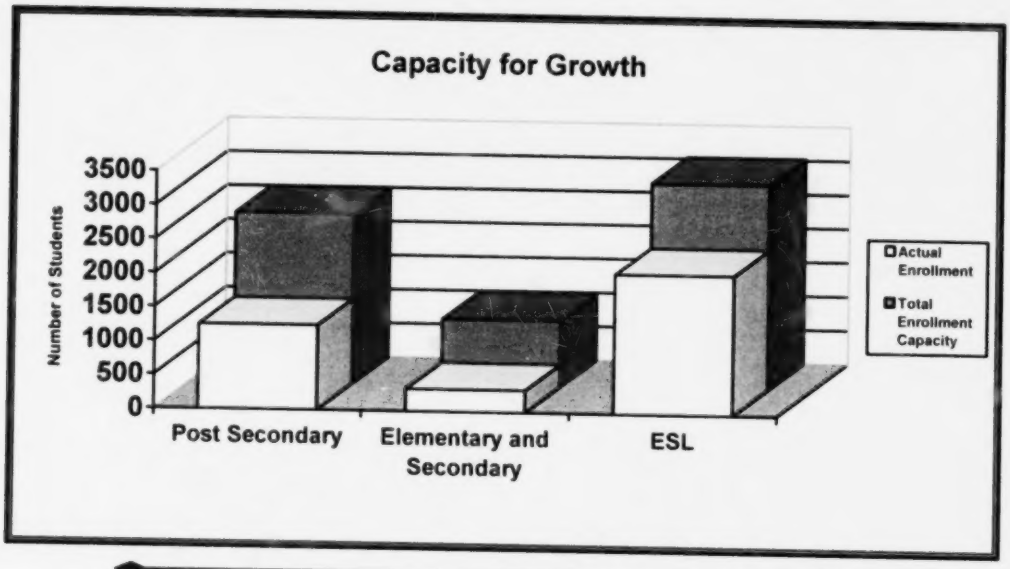


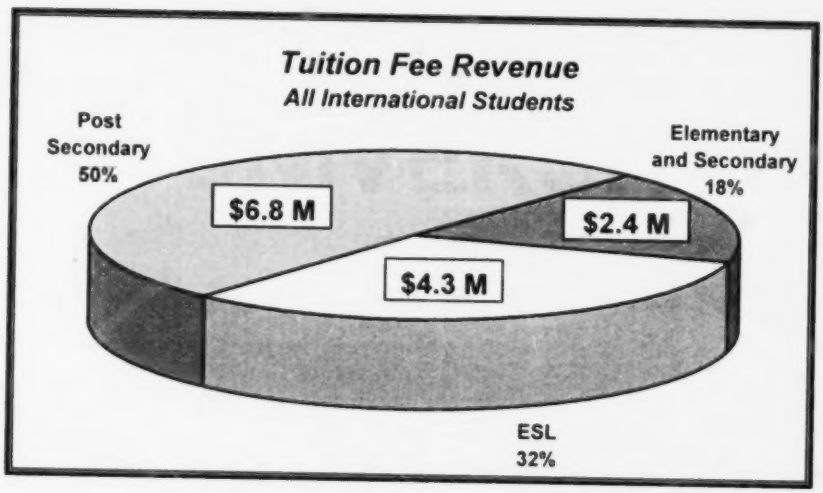


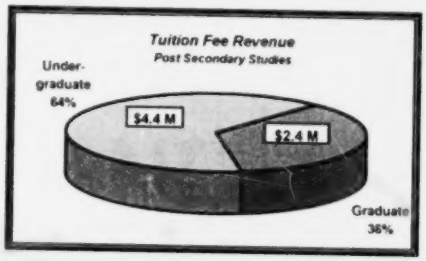


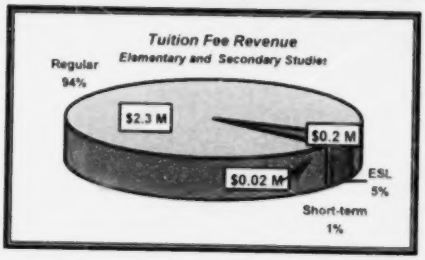


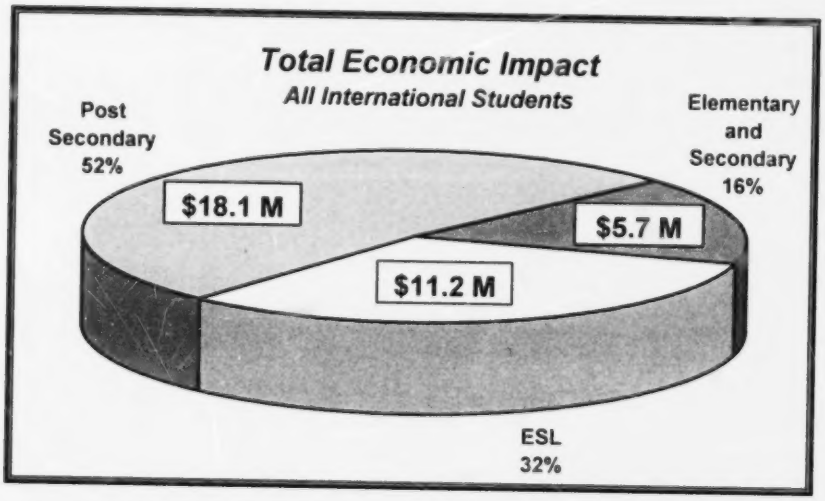



Capacity for Growth
Number of Students
3500
3000
2500
2000
1500
1000
500
0
Post Secondary
Elementary and Secondary
ESL
Actual Enrollment
Total Enrollment Capacity


Tuition Fee Revenue
All International Students
Post Secondary 50%
Elementary and Secondary 18%
ESL 32%
$6.8 M
$2.4 M
$4.3 M


Tuition Fee Revenue
Post Secondary Studies
Under-graduate 64%
Graduate 36%
$4.4 M
$2.4 M


Tuition Fee Revenue
Elementary and Secondary Studies
Regular 94%
ESL 5%
Short-term 1%
$2.3 M
$0.2 M
$0.02 M


Total Economic Impact
All International Students
Post Secondary 52%
Elementary and Secondary 16%
ESL 32%
$18.1 M
$5.7 M
$11.2 M

Section II

THE POST SECONDARY SECTOR

UNIVERSITIES AND COLLEGES

PART A – STUDENT NUMBERS

Universities were asked to provide information on undergraduate students, graduate students, exchange and other non-fee paying students. Colleges were asked for data on regular program students, short-term students, exchange and other non-fee paying students, and contract-training students. Both types of institutions were asked for student head counts and FTEs, or Full Time Equivalents.

Due to the small number of international exchange students, they were excluded from the report. No institutions reported enrolling any students classified in the "Other Non-Fee Paying Student" category.

Both colleges and universities were also asked to provide definitions for their academic year, semesters/terms, and their definition of a full time student through FTEs. This information was used to check the compatibility of the data in order to ensure accurate and appropriate statistical comparisons.

1. Undergraduate Students

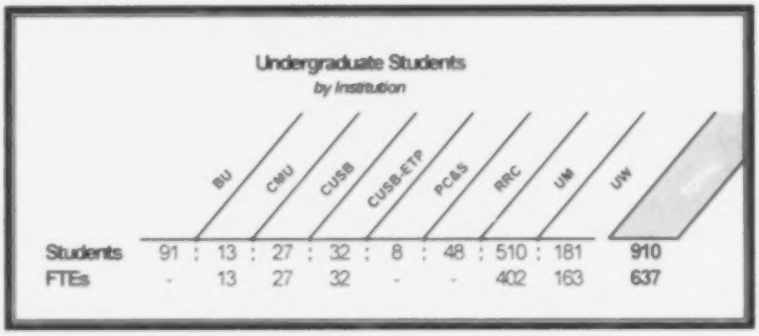
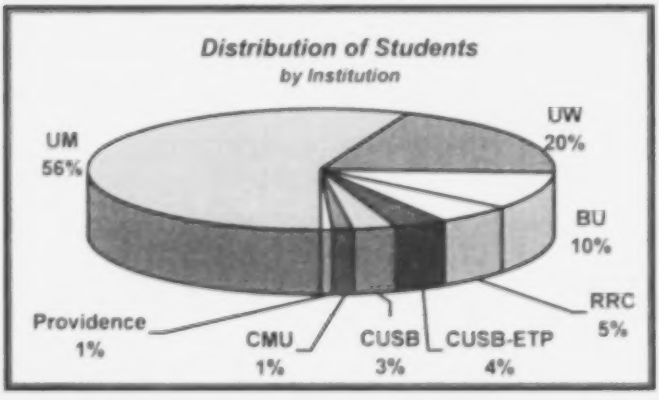


Figure 1

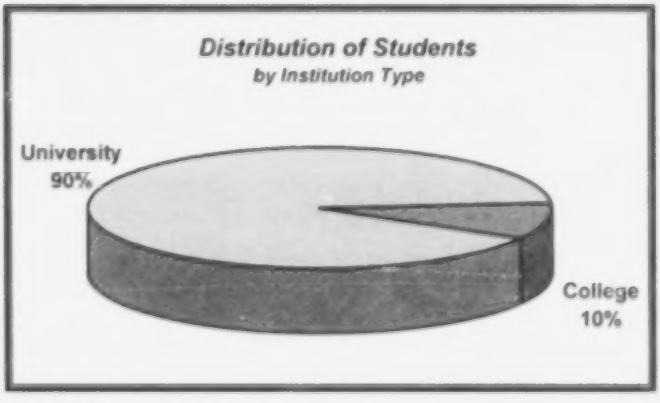
Notes on the Data

The total number of international undergraduate students among institutions participating in the survey is 910. Of those institutions who reported on FTEs (Full-Time Equivalents), the total number was 637, or 83.5% of the 763 students in those institutions.



Fifty-six percent of international undergraduate students enrolled in UM, followed by 20% at UW, 10% at BU, and 5% and RRC.

Figure 2



An overwhelming majority of undergraduate students attended universities versus colleges.

Figure 3

Institutional Abbreviations

BU – Brandon University
CMU – Canadian Mennonite University
CUSB – Collège universitaire de Saint-Boniface
CUSB-ETP – L'École technique et professionnelle
PC&S – Providence College & Seminary
RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

Undergraduate Students
by Institution and Country of Origin

	BU	CMU	CUSB	CUSB-ETP	PC&S	RRC	UM	UW	
Africa									**116**
Botswana						8			8
Cameroon	2			1					3
Ghana	6			1		5	2		14
Kenya						15	1		16
Malawi	1								1
Mali		5	8						13
Morocco			8						8
Mozambique						10			10
Nigeria	4					3			7
South Africa	3					6			9
Tanzania	1								1
Uganda							2		2
Zambia							1		1
Zimbabwe						4	1		5
Other		10				8			18
Asia									**522**
East Asia									***348***
China	12					32	9		53
Hong Kong				2		75	63		140
Japan	2					32	9		43
South Korea	3	5				35	2		45
North Korea							1		1
Macao, China							2		2
Taiwan	24					28	12		64
South Asia									***27***
Bangladesh	2						1		3
India	2			1		12			15
Pakistan	3					6			9
Southeast Asia									***111***
Indonesia	1					12	2		15
Malaysia				1		82	9		92
Singapore							1		1
Thailand							1		1
Vietnam							2		2
Other (throughout)									***36***
Other						14	22		36

Figure 4

(continued on next page)

Institutional Abbreviations

BU – Brandon University
CMU – Canadian Mennonite University
CUSB – Collège universitaire de Saint-Boniface
CUSB-ETP – L'École technique et professionnelle
PC&S – Providence College & Seminary
RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

	BU	CMU	CUSB	CUSB-ETP	PC&S	RRC	UM	UW	TOTAL
Europe									**118**
Albania	1								1
Belarus							1		1
Denmark						3			3
England	1								1
France		7	13			15	1		36
Germany	4	1		2		11	2		20
Greece							2		2
Hungary	2								2
Iceland						3			3
Italy							1		1
Lithuania		4					4		8
Netherlands						7			7
Poland							1		1
Portugal						4	1		5
Russia	2								2
Spain							1		1
Turkey							1		1
Ukraine		1				4			5
United Kingdom						4	3		7
Other						11			11
Middle East									**10**
Iran	1					4			5
Saudi Arabia							1		1
Syria	1								1
Other						3			3
North & Central America									**68**
Bahamas	1								1
Belize							1		1
Br West Indies	1								1
Jamaica	1						4		5
Mexico						11			11
St. Lucia	1								1
Trinidad & Tobago						4	3		7
United States	6					24	8		38
Other						3			3
Oceania									**5**
Australia	1					4			5
South America									**15**
Argentina							1		1
Brazil	2						1		3
Colombia						3	1		4
Paraguay		2							2
Other						5			5
Other									**56**
Other			5	3		48			56
TOTAL	**91**	**13**	**27**	**32**	**8**	**48**	**510**	**181**	**910**

Figure 4

Institutional Abbreviations

BU – Brandon University
CMU – Canadian Mennonite University
CUSB – College universitaire de Saint-Boniface
CUSB-ETP – L'École technique et professionnelle
PC&S – Providence College & Seminary
RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

Notes on the Data

RRC simply indicated that their international undergraduate students came from "24 different countries."

Countries with less than three students were classified as "other" by UM.

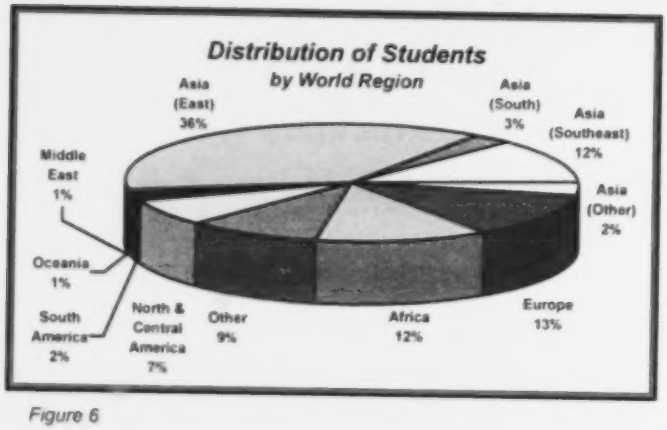
There was not enough College sector data to perform a College-only analysis.

Top Source Countries

	# of Students	% of Total (n = 910)
1 Hong Kong	140	15%
2 Malaysia	92	10%
3 Taiwan	64	7%
4 Other	56	6%
5 China	53	6%
6 South Korea	45	5%
7 Japan	43	5%
8 United States	38	4%
9 France	36	4%
TOTAL	**567**	**62%**

Hong Kong was the single largest source country with 15% of students citing this as their country or origin. This was followed by 10% of international undergraduate students from Malaysia and 7% from Taiwan. Six percent of the international undergraduate students could be identified neither with a country of origin nor world region and were listed as "Other."

Figure 5



There were more undergraduate students attending from Asia (53%) than all other regions combined. Europe and Africa provided roughly the same number of students, while North and Central America lagged behind. South America, the Middle East, and Oceania had only a small proportion of Manitoba's international student population.

Figure 6

Institutional Abbreviations

BU – Brandon University
CMU – Canadian Mennonite University
CUSB – College universitaire de Saint-Boniface
CUSB-ETP – L'École technique et professionnelle
PC&S – Providence College & Seminary
RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

Undergraduate Students
by Discipline of Study

	BU	CMU	CUSB	CUSB-ETP	PC&S	RRC	UM	UW	TOTAL
Agriculture									**13**
Agriculture & Food Sciences (Degree)						12			12
Agriculture & Food Sciences (Diploma)						1			1
Arts (Humanities & Social Sciences)									**138**
Arts	10	5	4			51			70
Economics	1						36		37
English							3		3
Geography	1						6		7
International Development Studies							3		3
Political Science							6		6
Psychology	2						6		8
Sociology	1						3		4
Business, Commerce, & Management									**223**
Administrative Studies							28		28
Business Administration	11			12	2				25
Business Computing							58		58
Business and Applied Arts					22				22
Commerce			1						1
Management						89			89
Continuing Education									**42**
Academic Development Programs					8				8
Continuing Education						34			34
Education									**7**
Education						5			5
TESOL				2					2
Engineering and Architecture									**82**
Architecture						5			5
Engineering						77			77
Information Technology									**18**
Computer Science	9								9
Multimedia communications			3						3
Systems Analyst			6						6
Health Sciences									**19**
Health & Applied Sciences					11				11
Nursing & Mental Health	1					7			8
Music & Fine Arts									**24**
Church Music				2					2
Music		1				5			6
Theatre & Drama							6		6
School of Art						10			10

Figure 7

(continued on next page)

Institutional Abbreviations

BU – Brandon University
CMU – Canadian Mennonite University
CUSB – Collège universitaire de Saint-Boniface
CUSB-ETP – L'École technique et professionnelle
PC&S – Providence College & Seminary
RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

	BU	CMU	CUSB	CUSB-ETP	PC&S	RRC	UM	UW	TOTAL
Sciences									**145**
Chemistry								6	6
Geology	1								1
Mathematics	3							17	20
Physics								3	3
Science	22		3			89			114
Zoology	1								1
University One*									**122**
University One			15			107			122
Other									**77**
Christian Studies		7							7
General Studies	5								5
Human Ecology						4			4
Industrial Technologies					7				7
Intercultural				2					2
Nil Degree**	23								23
Phys. Ed. & Rec.						3			3
Other			4	11		11			26
TOTAL	**91**	**13**	**27**	**32**	**8**	**48**	**510**	**181**	**910**

Figure 7

Notes on the Data

*University One is the U of M's first year program for new students.

**Nil Degree is listed for students who take courses but do not intend to complete a degree at BU.

Data from UW was based on information received on 64 of 172 students. On the advice of the UW International Office, this has been used as a representative sample to extrapolate the numbers for the entire group of 181. Likewise, ratios were used to extrapolate data from BU with the exception of some students whose discipline of study was listed.

Approximately 75 – 80 exchange students are included in the figures provided here by UM as they are not tracked separately.

The breakdown of areas of study in Figure 7 includes departments, faculties, and programs. The differentiation between these has not been made. The purpose of this chart is to examine broadly the areas of study that international students were interested in, not to provide faculty or program breakdowns.

Institutional Abbreviations

BU – Brandon University
CMU – Canadian Mennonite University
CUSB – Collège universitaire de Saint-Boniface
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PC&S – Providence College & Seminary
RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

Top Areas of Study

	# of Students	% of Total (n = 910)
1 University One	122	13%
2 Science	114	13%
3 Management	89	10%
4 Engineering	77	8%
5 Arts	66	7%
6 Business Computing	58	6%
TOTAL	**526**	**58%**

Figure 8

University One and Science each had 13% of international undergraduate students enrolled in 2000/01. Studies in Management were the next most popular, chosen by 10% of students.

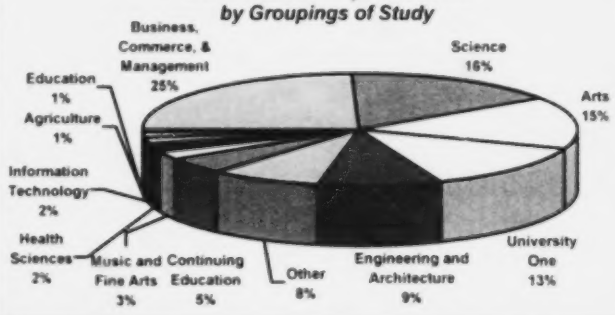

Figure 9

One in four international undergraduate students (25%) enrolled in Business, Commerce, & Management, followed by 16% in Science, 15% in Arts, 13% in University One, and 9% in Engineering and Architecture.

Institutional Abbreviations

BU – Brandon University
CMU – Canadian Mennonite University
CUSB – College universitaire de Saint-Boniface
CUSB-ETP – L'École technique et professionnelle
PC&S – Providence College & Seminary
RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

2. Graduate Students

Graduate Students
by Institution

	BU	PC&S	UM	TOTAL
Students	4	17	316	**337**
FTEs	-	17	306.7	**323.7**

Figure 10

Notes on the Data

The total number of international graduate students among institutions participating in the survey is 337. Of those institutions that reported on FTEs (Full-Time Equivalents), the total number was 323.7, or 97.2% of the 333 students in those institutions.

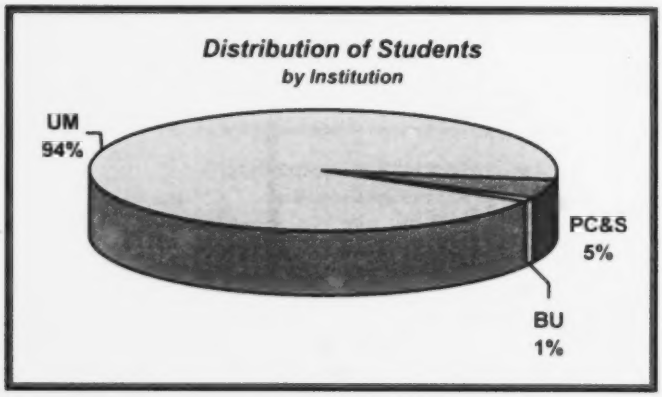

Figure 11

UM holds the dominant share of graduate students.

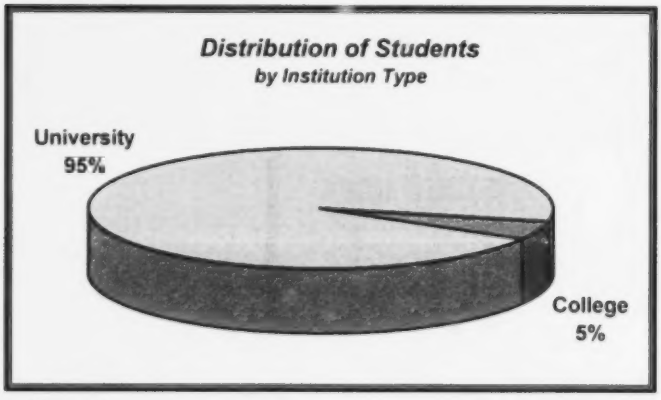

Figure 12

Nearly all graduate students are attending universities versus colleges.

Institutional Abbreviations

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CUSB-ETP – L'École technique et professionnelle
PC&S – Providence College & Seminary
RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

Graduate Students
by Institution and Country of Origin

	BU	PC&S	UM	TOTAL
Africa				**41**
Botswana			3	3
Egypt			4	4
Ghana			3	3
Libya			10	10
Nigeria			8	8
South Africa	1		3	4
Sudan		1		1
Other			8	8
Asia				**158**
East Asia				***69***
China			40	40
Hong Kong			5	5
Japan	1			1
South Korea		9	14	23
South Asia				***64***
Bangladesh			4	4
India		1	41	42
Pakistan		1	9	10
Sri Lanka			8	8
Southeast Asia				***17***
Malaysia			12	12
Philippines		1		1
Thailand			4	4
Other				***8***
Other			8	8
Europe				**29**
France			5	5
Germany		1	3	4
Ukraine		1	4	5
Other			15	15
Middle East				**59**
Iran			7	7
Kuwait			5	5
Saudi Arabia			45	45
Other			2	2
North & Central America				**30**
Trinidad & Tobago			3	3
United States	2		18	20
Other			7	7
Oceania				**2**
Other			2	2
South America				**18**
Argentina			4	4
Brazil		1	4	5
Colombia			5	5
Paraguay		1		1
Other			3	3
TOTAL	**4**	**17**	**316**	**337**

Figure 13

Institutional Abbreviations

BU – Brandon University
CMU – Canadian Mennonite University
CUSB – Collège universitaire de Saint-Boniface
CUSB-ETP – L'École technique et professionnelle
PC&S – Providence College & Seminary
RRC – Red River College
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UW – University of Winnipeg

Notes on the Data

As is the case with undergraduate students, Asia also represents the largest source of graduate students.

Most Post Graduate Medical Education (PGME) students are from Saudi Arabia. They study at UM under group contracts.

Top Source Countries

	# of Students	% of Total (n = 337)
1 Saudi Arabia	45	13%
2 India	42	12%
3 China	40	12%
4 South Korea	23	7%
5 United States	20	6%
TOTAL	**170**	**50%**

Figure 14

The largest source country for international graduate students is not in Asia, but rather the Middle East region. Saudi Arabia accounts for 13% of these students followed by 12% each for India and China.

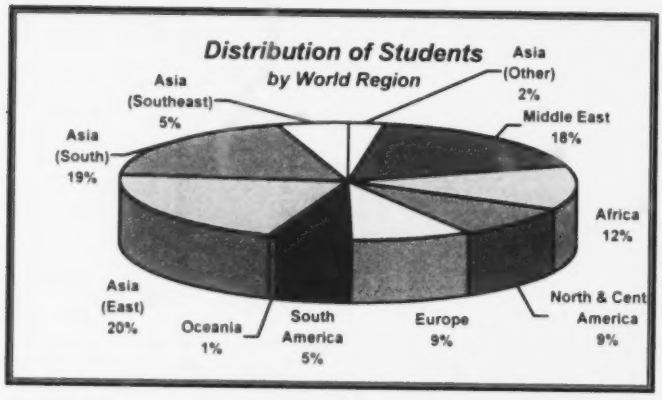

Figure 15

Graduate students from Asia constitute just under half (46%) of all of graduate students in Manitoba. Students from the Middle East are the next largest group (18%). The proportions of graduate students coming from Africa, North and Central America, and Oceania are roughly equivalent to those in the undergraduate sector.

Institutional Abbreviations

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RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

Graduate Students
by Discipline of Study

	BU	PC&S	UM	TOTAL
Agriculture				**26**
Agriculture and Food Sciences			26	26
Arts (Humanities & Social Sciences)				**40**
Arts			34	34
Rural Development	2			2
Social Work			4	4
Education				**9**
Education	2		7	9
Engineering and Architecture				**93**
Architecture			12	12
Engineering			81	81
Health Sciences				**23**
Dentistry			2	2
Medical Rehabilitation			1	1
Medicine			19	19
Pharmacy			4	4
Management				**13**
Management			13	13
Post Graduate Medical Education				**60**
Post Graduate Medical Education*			60	60
Sciences				**39**
Natural Resources Institute			2	2
Science			37	37
Other				**31**
Graduate Studies			5	5
Human Ecology			5	5
Law			2	2
Physical Education and Recreation Studies			2	2
Other**		17		17
TOTAL	**4**	**17**	**316**	**337**

Figure 16

Notes on the Data

*Most Post Graduate Medical Education (PGME) students are from Saudi Arabia. They study at UM under group contracts.

**PC&S offers Master's studies in Divinity and Arts and a Ministry Doctorate. A breakdown of the numbers of students taking each of these programs was not provided so they are all listed as "Other."

The analysis of the areas of study among the institutions was not conducted as graduate studies are offered almost exclusively at UM.

Top Majors of Study

	# of Students	% of Total (n = 337)
1 Engineering	81	24%
2 Post Graduate Medical Education	60	18%
3 Science	37	11%
4 Arts	34	10%
5 Agriculture and Food Sciences	26	8%
6 Medicine	19	6%
7 Other	17	5%
TOTAL	**274**	**81%**

Figure 17

Engineering is the choice of nearly one-quarter (24%) in international graduate students, followed by Post Graduate Medical Education (18%), Science (11%), and Arts (10%).

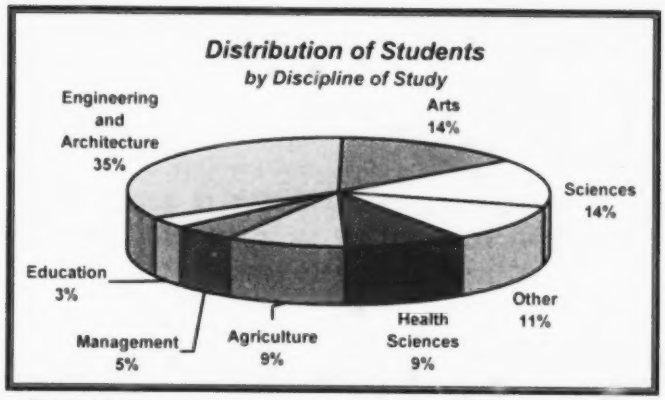

Figure 18

Over one-third (35%) of international graduate students have chosen to study Engineering and Architecture. Many graduate students have also chosen to study Arts (14%) and Sciences (14%).

Institutional Abbreviations

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PART B – POTENTIAL CAPACITY

Knowing the ability of colleges and universities to admit more students than are currently enrolled provides a key indicator by which to gauge Manitoba's capacity for growth in the international education sector.

Estimating student capacity is a complex task based on many variables including program flexibility, types of courses taught, availability of qualified teachers and professors, and sufficient physical space and infrastructure. Capacity can be interpreted in two different ways. It can mean the ability of an institution to admit more students within the existing structures and programs available. On the other hand, it can also mean the ability of an institution to expand its programs to accommodate additional students beyond its current theoretical maximum.

Institutions were asked to assess their potential ability to admit more international students into their programs. This data was then evaluated against their actual international student enrollment to determine their total theoretical capacity and their success in reaching that theoretical capacity. Capacity is used as an institution-wide term in this context – breakdowns of specific faculties or programs are not examined.

For the purposes of the analyses in this sub-section, the report will focus on institutions' success in reaching their estimated capacity to immediately enroll international students. It will not focus on their ability to further expand their theoretical capacity through medium- and long-term measures. This section will also explore the barriers that institutions have faced in trying to achieve their maximum enrollment.

1. Overall Potential Capacity

	Actual Enrollment (x)	Additional Capacity (y)	Percent of Theoretical Maximum Achieved (x/(x+y))
BU	95	300	24%
CMU	13	20	39%
CUSB	27	27	50%
CUSB-ETP	32	32	50%
PC&S	25	55	31%
RRC	48	25	66%
UM	826	1574	34%
UW	181	469	28%
TOTAL	**1247**	**2502**	**33%**

Figure 19

Notes on the Data

Some institutions provided a breakdown of their estimated capacity on a program by program basis. For the purposes of these analyses, all numbers, regardless of type of capacity, have been combined.

Where estimated capacity was provided as a range, the range was averaged. In other instances, criteria affecting capacity were provided and not actual numbers – in these instances, the number of spaces was estimated based on the criteria provided.

It is important to exercise caution in interpreting this data. Note that while it is important for institutions who have room for more international students to admit more, it is also important for institutions who have reached their capacity to find ways of accommodating a greater number of international students.

Institutional Abbreviations: **BU** – Brandon University; **CMU** – Canadian Mennonite University; **CUSB** – College universitaire de Saint-Boniface; **CUSB-ETP** – L'Ecole technique et professionnelle; **PC&S** – Providence College & Seminary; **RRC** – Red River College; **UM** – University of Manitoba; **UW** – University of Winnipeg

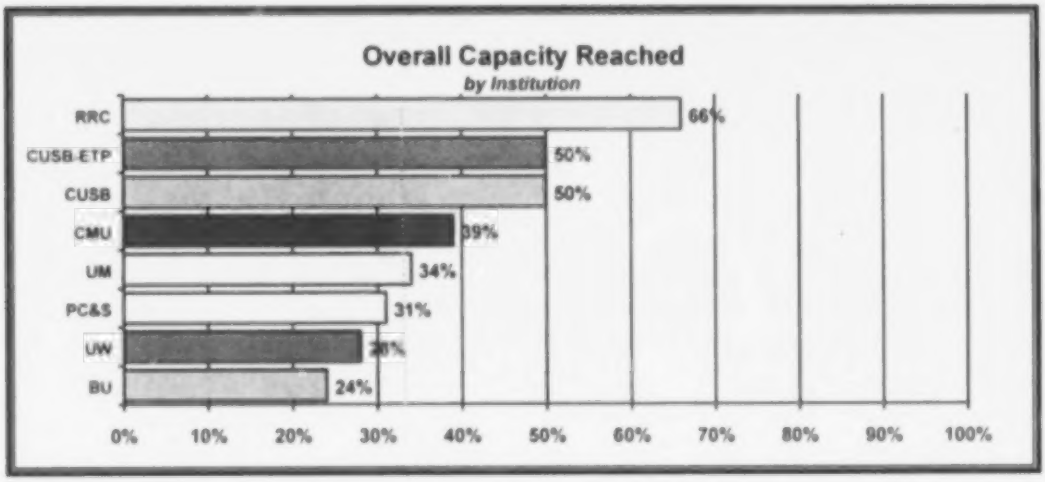

Figure 20

The dashed line indicates the average capacity reached of all institutions – 33%.

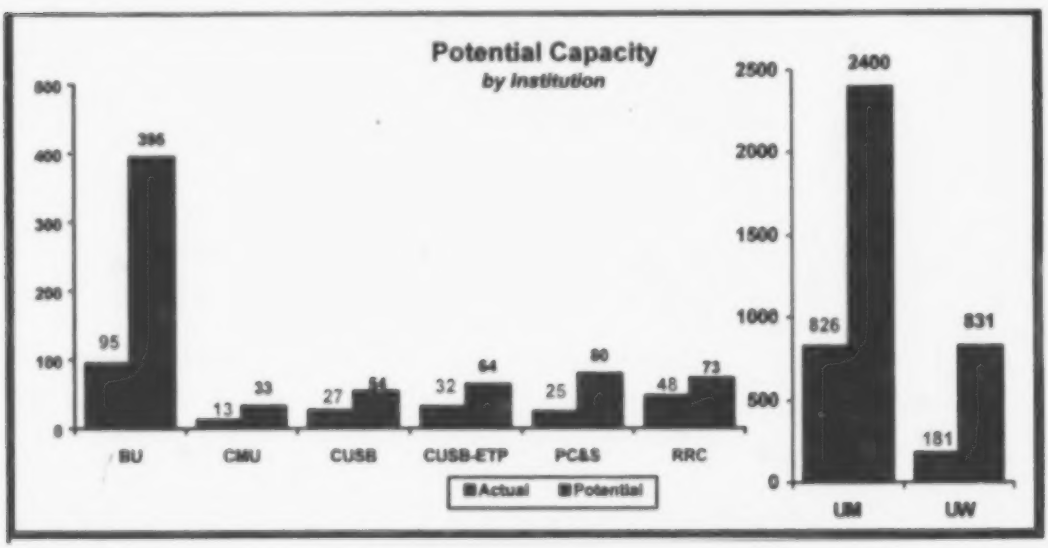

Figure 21

This graph demonstrates actual numbers of students that studied in each institution in 2000/01 against each institution's estimated capacity. It shows that although some institutions enrolled international students to a smaller fraction of their capacity, the actual number of students enrolled was still significant.

Institutional Abbreviations: **BU** - Brandon University; **CMU** - Canadian Mennonite University; **CUSB** - Collège universitaire de Saint-Boniface; **CUSB-ETP** - L'École technique et professionnelle; **PC&S** - Providence College & Seminary; **RRC** - Red River College; **UM** - University of Manitoba; **UW** - University of Winnipeg

2. Barriers to Achieving Greater Capacity

The participating post secondary institutions identified several obstacles to achieving full capacity.

The most frequently noted obstacle to achieving full capacity in international student enrollments is the limitation of course offerings. Though there may be room for 40 students in a particular department, these types of courses may not be in demand, making full enrollment impossible.

Another noted barrier to achieving full capacity is the challenge of resources for recruitment of students to programs where capacity has not been reached.

Several other obstacles were mentioned including a lack of residence space, insufficient resources to offer appropriate support services for international students, difficulties in obtaining visas, and the rural location of some campuses.

At UM, some faculties are open to international student enrollment, others (particularly professional programs) are not.

PC&S noted that its requirement to receive a statement of faith from aspiring students means that its potential market may be smaller than most institutions.

PART C – STUDENT FEES AND ECONOMIC IMPACT

Universities and colleges were asked to provide the costs of tuition, accommodation, and all related fees charged to international students. Some of the information has been averaged and used to calculate approximate revenue for each of the institutions.

This data, along with estimated student expenditures, was used to estimate the amount of money that international students inject into the provincial economy.

1. Undergraduate Students

Average Tuition & Fee Revenue
by Institution

Institution	Average Tuition & Fees	# of FTEs	Approximate Revenue
BU	$5,585.00	91	$508,235.00
CMU	$5,675.00	13	$73,775.00
CUSB	$6,500.00	27	$175,500.00
CUSB-ETP	$4,500.00	32	$144,000.00
PC&S	$4,730.00	8	$37,840.00
RRC	$7,600.00	48	$364,800.00
UM	$5,455.50	402	$2,193,111.00
UW	$5,496.50	163	$895,929.50
TOTAL	**$5,692.75 (AVG)**	**784**	**$4,393,190.50**

Figure 22

Notes on the Data

For an analysis of consolidated revenue numbers in the section, please see Part 3 of this sub-section, "Consolidated Student Fee Revenue."

Where ranges for tuition or fees were given, an average was used. Tuition from UM was based on the average cost of a credit hour from Arts, Science, and Education.

The numbers include tuition and charges related to academics (such as mandatory library fees or application fees). They do not include accommodation fees, insurance costs, student union dues, and the like.

The calculations are based on the number of FTEs per institution. Where FTEs were not provided, student numbers were used.

Institutional Abbreviations
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UM – University of Manitoba
UW – University of Winnipeg

2. Graduate Students

Average Tuition & Fee Revenue
by Institution

Institution	Average Tuition & Fees	# of FTEs	Approximate Revenue
BU	$2,111.11	4	$8,444.44
PC&S	$2,530.00	17	$43,010.00
UM	$3,809.30	256.7	$1,296,420.90
UM - PGME	$18,000.00	60	$1,080,000.00
TOTAL	**$2,816.80 (AVG)**	**337.7**	**$2,427,875.34**

Figure 23

Notes on the Data

For an analysis of consolidated revenue numbers in the section, please see Part 3 of this sub-section, "Consolidated Student Fee Revenue."

UM Post Graduate Medical Education (PGME) students were calculated separately because of their higher tuition fees. They also were excluded from the calculation of the tuition averages, because tuition for these students is set out by contracts with international partners.

Where ranges for tuition or fees were given, an average was used.

The numbers include tuition and charges related to academics (such as mandatory library fees or application fees). They do not include accommodation fees, insurance costs, student union dues, and the like.

The calculations are based on the number of FTEs per institution. Where FTEs where not provided, student numbers were used.

At UM, differential fees are charged but rebated to international graduate students.

The average tuition and fees of all institutions is $2,816.80 (excluding PGME students).

3. Consolidated Student Fee Revenue

Overall Average Tuition & Fee Revenue
by Institution

Institution	# of FTEs	Total Estimated Revenue	% of Overall Revenue
BU	95	$516,679.44	7.6%
CMU	13	$73,775.00	1.1%
CUSB	27	$175,500.00	2.6%
CUSB-ETP	32	$144,000.00	2.1%
PC&S	25	$80,850.00	1.2%
RRC	48	$364,800.00	5.3%
UM	708.7	$4,569,531.90	67.0%
UW	163	$895,929.50	13.1%
TOTAL	**1,111.7**	**$6,821,065.84**	**100.0%**

Figure 24

Manitoba colleges and universities generated $6.8 million of revenue from 1,111.7 FTEs.

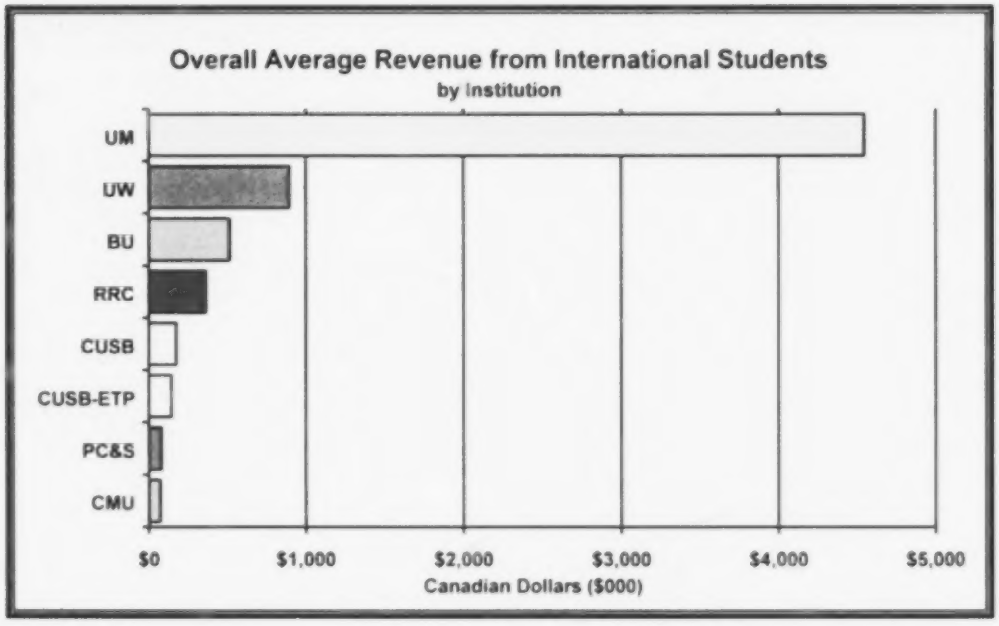

Figure 25

Institutional Abbreviations
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CUSB-ETP – L'École technique et professionnelle
PC&S – Providence College & Seminary
RRC – Red River College
UM – University of Manitoba
UW – University of Winnipeg

4. Economic Impact

Estimated Economic Impact		
A	Number of Students/FTEs*	1,111.7
B	Estimated Length of Study	8 months
C	Monthly Student Spending**	$1,100.00
D	Total Student Spending (A x B x C)	$9,782,960.00
E	Total Tuition Fee Revenue	$6,821,065.84
F	Total Economic Impact (D + E)	$16,604,025.84
G	Direct Value-Added Multiplier***	1.09
H	**TOTAL VALUE-ADDED ECONOMIC IMPACT**	**$18,098,388.17**

Figure 26

Notes on the Data

*As with Figures 22-24, the calculations are based on the number of FTEs per institution. Where FTEs were not provided, student numbers were used.

**Includes estimates of average spending on accommodation, food, clothing, transportation, entertainment, and miscellaneous incidentals.

***Value-added measurement of impact is calculated using a ratio of 1.09, meaning that for every dollar spent by an international student, there is a $1.09 impact on the province. This approach is used to measure other sectors of Manitoba's economy and is in use in other provinces to measure one form of the economic impact of international students.

Section III

THE ELEMENTARY AND SECONDARY SECTOR

SCHOOLS AND SCHOOL DIVISIONS

PART A – STUDENT NUMBERS

All institutions that participated in the survey were school divisions with the exception of Balmoral Hall, St. John's-Ravenscourt, and The University of Winnipeg Collegiate, all of which are independent schools. The shorthand term "schools/divisions" is used throughout this section to refer to the entire group of elementary and secondary institutions. The phrase "public schools/divisions" refers to all institutions except the three noted above.

Schools/Divisions were asked to provide information on regular fee-paying students, exchange and other non-fee paying students, ESL (English as a Second Language) students, and short-term study students.

No institutions reported enrolling any students classified under the "Other Non-Fee Paying Student" category. It has therefore been omitted from this report.

Schools/Divisions were also asked to provide definitions for their semesters or terms to check the compatibility of the data in order to ensure accurate and appropriate statistical comparisons.

Throughout this section, there are references to the "elementary and secondary" education system. This term is used to describe the education students receive from Grades 1 – 12. These grades are divided into three major components: the Early Years (Grades 1 – 4), the Middle Years (Grades 5 – 8), and the Senior Years (Grades 9 – 12). The report also provides more detail of the Senior Years by showing Senior 1 (Grade 9), Senior 2 (Grade 10), Senior 3 (Grade 11), and Senior 4 (Grade 12).

Where analysis is this sub-section refers to provincial regions (e.g. "Central," "Parkland/Westman"), they are based on regions established by the Province of Manitoba. For a graphical illustration of the regional map, please visit the following website: http://www.edu.gov.mb.ca/ks4/schools/schooldivmap.html.

1. Regular International Students

(a) Students Enrolled for One Academic Year

Regular Students Enrolled for One Academic Year
by School/Division and Level of Study

	Early	Middle	Senior 1	Senior 2	Senior 3	Senior 4	Total
Antler River						1	**1**
Balmoral Hall		10	1	10	6	3	**30**
Fort Garry		2	3	5	15	15	**40**
Garden Valley				1	2	1	**4**
Interlake					3	8	**11**
Lakeshore			1	3	3	1	**8**
Lord Selkirk				1		1	**2**
River East				2	6	4	**12**
St. James-Assiniboia		2		1	6	10	**19**
St. John's Ravenscourt		1	3	3	12	2	**21**
Souris Valley		1		1	2	2	**6**
UW Collegiate					10	32	**42**
TOTAL	**0**	**16**	**8**	**27**	**65**	**80**	**196**

Figure 27

Notes on the Data

Of the twenty schools/divisions that indicated they were involved in international education, 12 reported having regular international students enrolled during the 2000/01 academic year.

The term "Regular International Students" refers to fee-paying students studying the Manitoba curriculum who cannot be classified as exchange students, ESL Students, or Short-term students.

For analyses of consolidated numbers of Regular International students, please see the Part 1 (c) of this sub-section, "Consolidated Student Numbers."

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations:

Balmoral Hall – Balmoral Hall School
St. James – St. James-Assiniboia (School Division)
St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

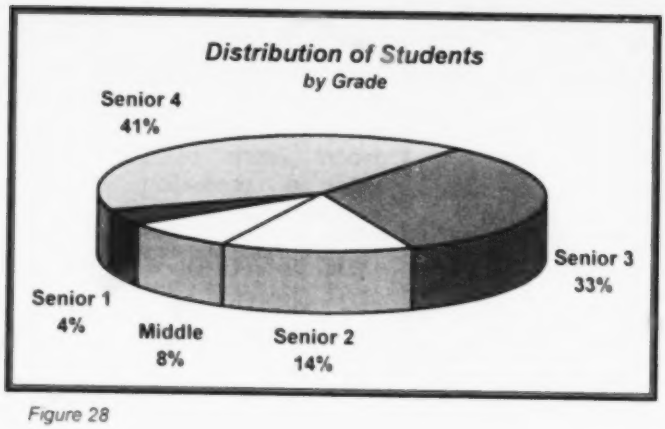

Figure 28

Forty-one percent of international students at the elementary and secondary levels in Manitoba were enrolled at the Senior 4 level. One-third (33%) are in Senior 3, followed by 14% in Senior 2. Fully 88% of all international student enrollments in Manitoba were at the Senior 2 – Senior 4 levels.

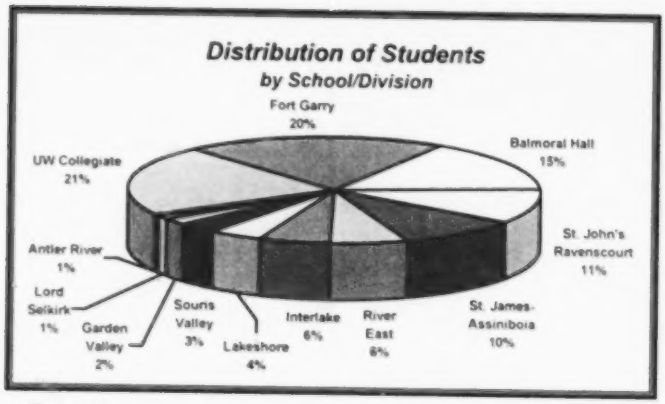

Figure 29

Twenty-one percent of international students at the elementary and secondary levels in Manitoba were enrolled at the UW Collegiate followed closely by the Fort Garry School Division, which enrolled 20%. Fifteen percent attended Balmoral Hall, followed by 11% who attended St. John's-Ravenscourt, and 10% who attended St. James-Assiniboia. River East and Interlake each enrolled 6% of these students.

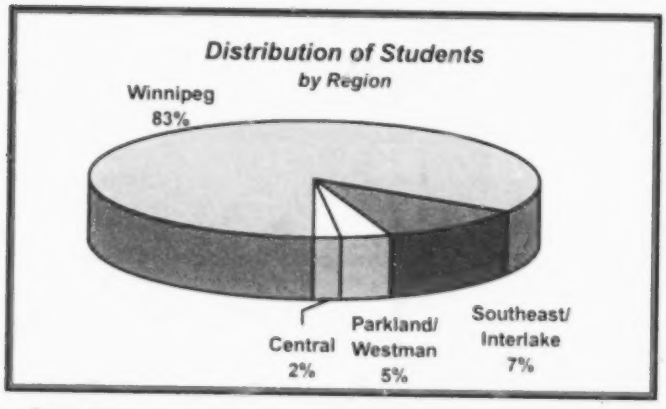

Figure 30

Eighty-three percent of international students at the elementary and secondary levels in Manitoba were enrolled in schools within Winnipeg. This was much greater than the overall share of the general Manitoba population that resided in Winnipeg (55%).

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School

St. James – St. James-Assiniboia (School Division)

St. John's – St. John's-Ravenscourt School

UW Collegiate – University of Winnipeg Collegiate

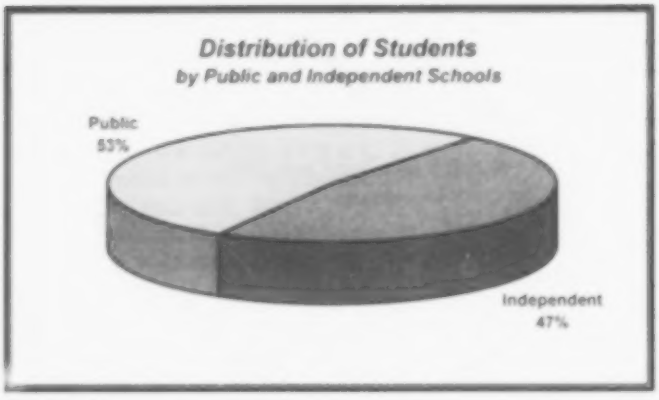

Figure 31

Just over half (53%) of international students at the elementary and secondary levels in Manitoba were enrolled in public schools. This was less than the overall share of the general Manitoba population attending public schools (93%).

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally used abbreviations:

Balmoral Hall - Balmoral Hall School
St. James - St. James-Assiniboia (School Division)
St. John's - St. John's-Ravenscourt School
UW Collegiate - University of Winnipeg Collegiate

Regular Students Enrolled for One Academic Year
by School Division and Country of Origin

	Antler River	Balmoral Hall	Fort Garry	Garden Valley	Interlake	Lakeshore	Lord Selkirk	River East	St. James	St. John's	Souris Valley	UW Collegiate	TOTAL
Africa													**5**
Ghana							1						1
Zambia												4	4
Asia													**98**
East Asia													**93**
China		6							1				7
Hong Kong	6	6				1	2	1	1			12	29
Japan	1	5		4			2						12
South Korea	2	11							9			2	24
Taiwan		9						1				11	21
Southeast Asia													**5**
Indonesia		1											1
Malaysia												1	1
Singapore							1						1
Thailand	1												1
Vietnam												1	1
Europe													**21**
Austria									1				1
Belgium		1											1
France			1										1
Germany			3	2			3		5			1	14
Latvia				1									1
Russia		2							1				3
Middle East													**3**
Saudi Arabia		1							2				3
North & Central America													**45**
Br. West Indies		1											1
Mexico	1	13				8	1	4	5		6	3	41
Trinidad												2	2
USA												1	1
Oceania													**5**
Australia		1			4								5
South America													**19**
Brazil			2					12				4	18
Guyana									1				1
TOTAL	**1**	**29**	**40**	**4**	**11**	**8**	**2**	**13**	**19**	**21**	**6**	**42**	**196**

Figure 32

Notes on the Data

For analyses of consolidated numbers of Regular International students by country of origin, please see Part 1 (c) of this sub-section, "Consolidated Student Numbers."

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations:

Balmoral Hall – Balmoral Hall School
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St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

Top Source Countries

	# of Students	% of Total (n = 196)
1 Mexico	41	21%
2 Hong Kong	29	15%
3 South Korea	24	12%
4 Taiwan	21	11%
5 Japan	12	6%
6 China	7	4%
TOTAL	**134**	**68%**

Figure 33

Over one-fifth (21%) of regular international students studying at the elementary and secondary levels for one academic year came from Mexico, followed by Hong Kong (15%). The top six source countries account for 68% of these students.

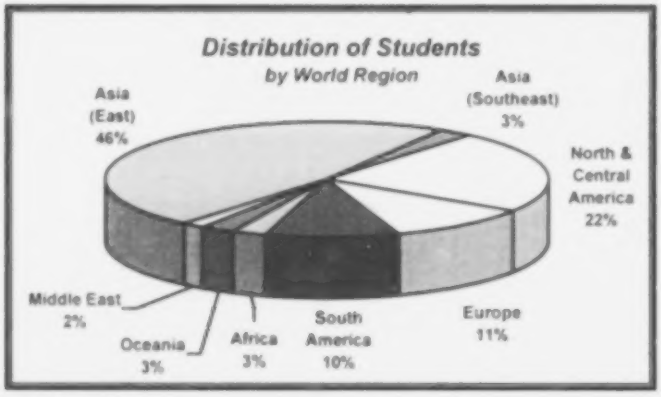

Figure 34

Almost one-half (49%) of one-year international students studying at the elementary and secondary levels in Manitoba came from Asia. Students from North and Central America were the second-largest contingent (22%) followed by students from Europe (11%) and South America (10%). The remaining 8% of international students came from all other parts of the world.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally used abbreviations: **Balmoral Hall** – Balmoral Hall School; **St. James** – St. James-Assiniboia (School Division); **St. John's** – St. John's-Ravenscourt School; **UW Collegiate** – University of Winnipeg Collegiate

1. Regular International Students

(b) Students Enrolled for One Semester/Term/Half-Year

Regular Students Enrolled for One/Semester/Term/Half-Year
by School/Division and Level of Study

	Early	Middle	Senior 1	Senior 2	Senior 3	Senior 4	Total
Balmoral Hall			1	2	1		**4**
Fort Garry				1	13	37	**51**
Lord Selkirk				2			**2**
River East				1	3	2	**6**
St. James-Assiniboia	1	1		3	16	4	**25**
St. Vital				1			**1**
TOTAL	**1**	**1**	**1**	**10**	**33**	**43**	**89**

Figure 35

Notes on the Data

Of the twenty school divisions that indicated they were involved in international education, 6 reported having regular international students enrolled for one semester/term/half-year during the 2000/01 academic year.

Of the 89 students who enrolled for one semester/term/half-year, 17 (or 19.1%) indicated that they had planned to enroll for another term/semester/half-year in a different academic year.

For analyses of consolidated numbers of Regular International students, please see Part 1 (c) of this sub-section, "Consolidated Student Numbers."

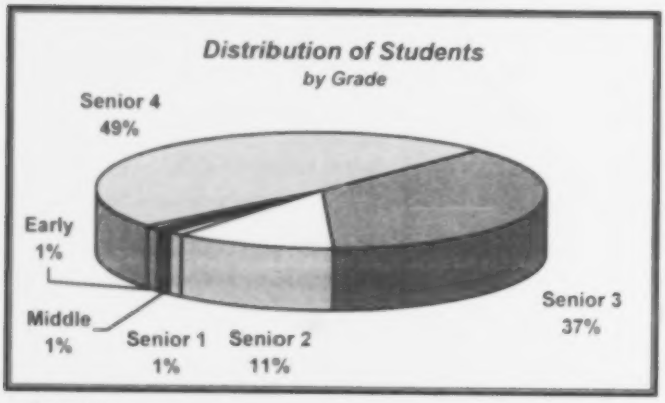

Figure 36

Almost one-half (49%) of international students at the elementary and secondary levels in Manitoba enrolled for one semester/term/half-year studied at the Senior 4 level. Thirty-seven percent were in Senior 3, followed by 11% in Senior 2. Fully 97% of all international student enrollments in Manitoba were at the Senior 2 – Senior 4 levels.

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St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

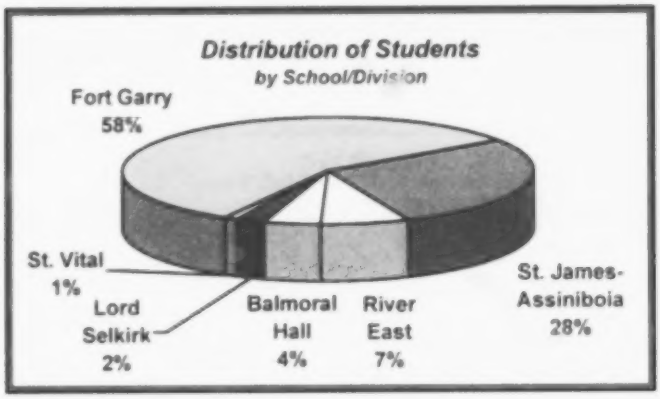

Figure 37

Fifty-eight percent of international students at the elementary and secondary levels enrolled for one-semester/term/half-year attended Fort Garry. Twenty-eight percent attended St. James-Assiniboia, followed by 7% who attended River East, and 4% who attended Balmoral Hall.

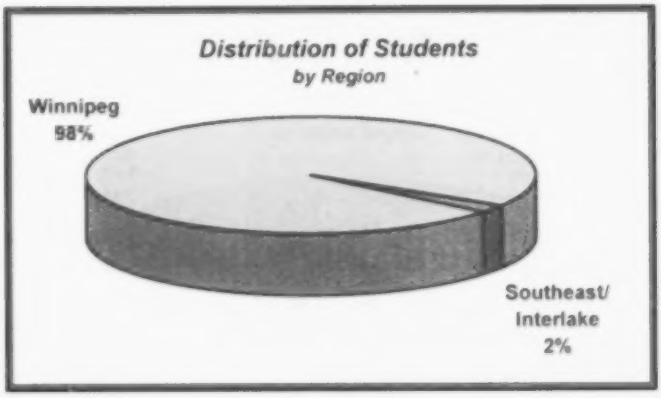

Figure 38

Almost all (98%) of the students at the elementary and secondary levels enrolled for one-semester/term/half-year attended a school in Winnipeg. This was much greater than the overall share of the general Manitoba population that resided in Winnipeg (55%).

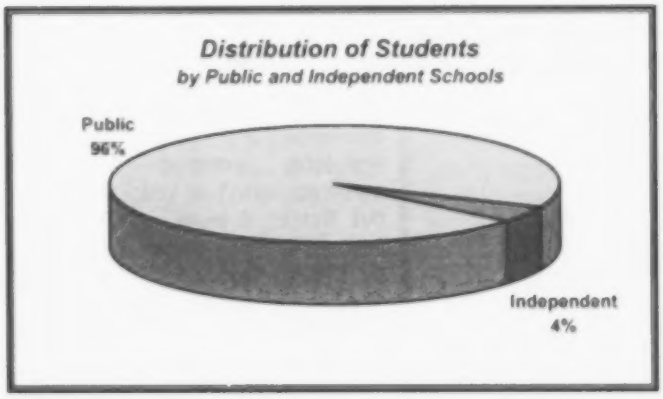

Figure 39

Almost all (96%) of the students at the elementary and secondary levels enrolled for one semester/term/half-year attended a public school. This was similar to the overall share of the general Manitoba population attending public schools (93%).

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St. John's – St. John's-Ravenscourt School

UW Collegiate – University of Winnipeg Collegiate

Regular Students Enrolled for One Semester/Term/Half-Year
by School/Division and Country of Origin

	Balmoral Hall	Fort Garry	Lord Selkirk	River East	St. James	St. Vital	TOTAL
Asia							**19**
East Asia							***18***
China	2	1					3
Hong Kong		2		1			3
Japan	1	2		3			6
South Korea	1	2			1	1	5
Taiwan					1		1
Southeast Asia							***1***
Thailand		1					1
Europe							**1**
Turkey					1		1
North & Central America							**34**
Mexico		33			1		34
South America							**34**
Brazil		10	2		21		33
Columbia				1			1
TOTAL	**4**	**51**	**2**	**5**	**25**	**1**	**88**

Figure 40

Notes on the Data

For analyses of consolidated numbers of Regular International students by country of origin, please see Part 1 (c) of this sub-section, "Consolidated Student Numbers."

Top Source Countries

	# of Students	% of Total (n = 88)
1 Mexico	34	39%
2 Brazil	33	38%
3 Japan	6	7%
4 South Korea	5	6%
TOTAL	**78**	**89%**

Figure 41

The two top source countries for student studying for one semester/term/half-year were Mexico (39%) and Brazil (38%).

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St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

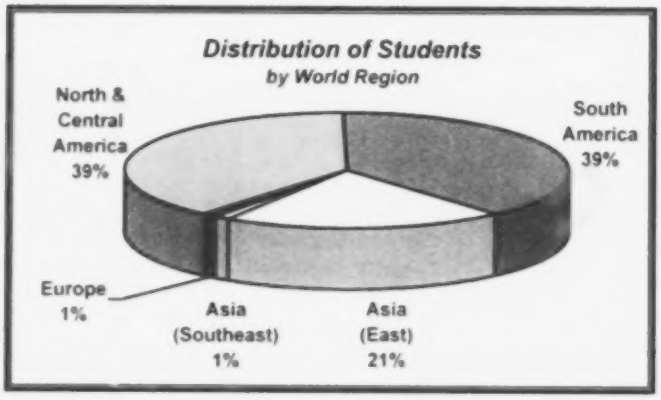

Figure 42

Thirty-nine percent of one semester/term/half-year students studying at the elementary and secondary levels came from North and Central America along with 38% from South America. Twenty-two percent of these students came from Asia.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
St. James – St. James-Assiniboia (School Division)
St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

1. Regular International Students

(c) Consolidated Student Numbers

Consolidated Data Regular Students Enrollments
by School/Division and Level of Study

	Early	Middle	Senior 1	Senior 2	Senior 3	Senior 4	Total
Antler River						1	**1**
Balmoral Hall		10	1.5	11	6.5	3	**32**
Fort Garry		2	3	5.5	21.5	33.5	**65.5**
Garden Valley				1	2	1	**4**
Interlake					3	8	**11**
Lakeshore			1	3	3	1	**8**
Lord Selkirk				2		1	**3**
River East				2.5	7.5	5	**15**
St. James-Assiniboia	0.5	2.5	0	2.5	14	12	**31.5**
St. John's Ravenscourt		1	3	3	12	2	**21**
St. Vital				0.5			**0.5**
Souris Valley		1		1	2	2	**6**
UW Collegiate					10	32	**42**
TOTAL	**0.5**	**16.5**	**8.5**	**32**	**81.5**	**101.5**	**240.5**

Figure 43

Notes on the Data

If the number of students enrolled for one semester/term/half-year is multiplied by a factor of ½, a rough comparison between these students and the one-year students can be made. These numbers can thus be added to the overall total. Figures 43 - 48 reflect these consolidated numbers.

Where the country of origin is listed as "other" the student origins were either unknown or not provided.

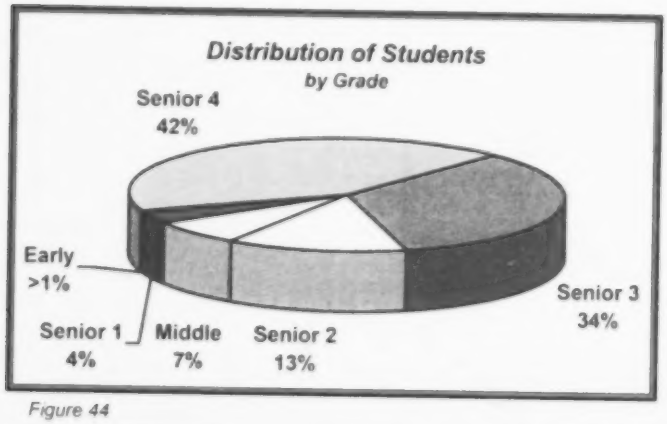

Figure 44

Forty-two percent of international students at the elementary and secondary levels in Manitoba were enrolled at the Senior 4 level followed by 34% in Senior 3, and 13% in Senior 2. Students enrolled in the Early Years were less than 1% of the student population.

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UW Collegiate – University of Winnipeg Collegiate

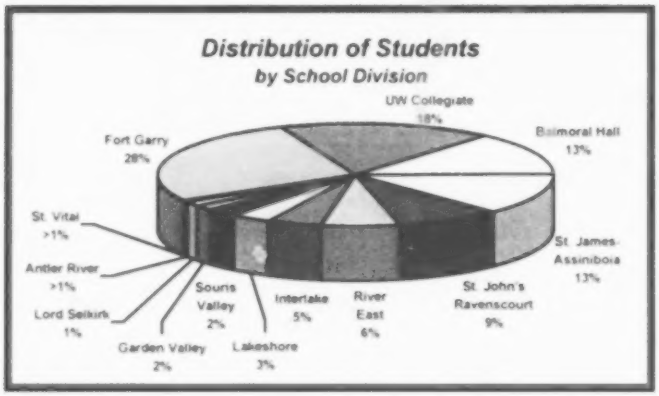

Figure 45

Fort Garry had the largest share of international students (28%) followed by UW (18%). Balmoral Hall's share was 13%, St. James-Assiniboia's was 13%, St. John's-Ravenscourt's was 9% and River East was 6%.

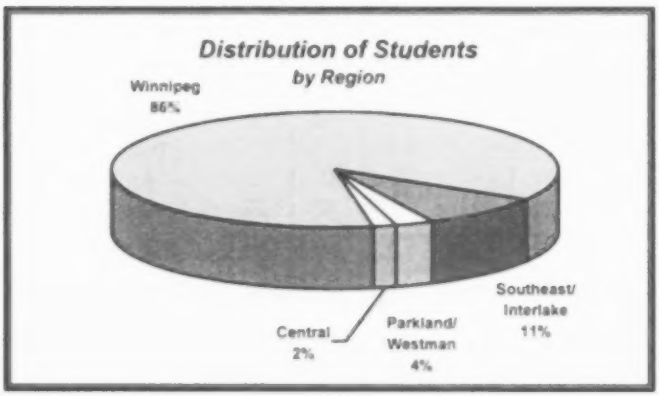

Figure 46

Winnipeg's share of international students at the elementary and secondary levels in Manitoba was 86%.

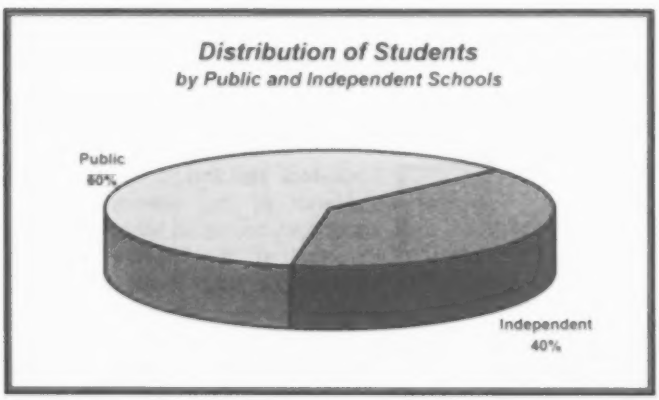

Figure 47

Sixty percent of international students at the elementary and secondary levels in Manitoba were in public schools.

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St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

Consolidated Data on Regular Student Enrollments
by School/Division and Country of Origin

	Arthur River	Balmoral Hall	Fort Garry	Garden Valley	Interlake	Lakeshore	Lord Selkirk	River East	St. James	St. John's	St. Vital	Souris Valley	UW Collegiate	TOTAL
Africa														**5**
Ghana								1						1
Zambia													4	4
Asia														**107.5**
East Asia														***102.5***
China		1	6.5							1				8.5
Hong Kong		6	7				1	2.5	1	1			12	30.5
Japan		1.5	6		4			3.5						15
South Korea		2.5	12						0.5	9	0.5		2	26.5
Taiwan			9.5						1.5				11	22
Southeast Asia														***5***
Indonesia			1											1
Malaysia													1	1
Singapore								1						1
Thailand		1												1
Vietnam													1	1
Europe														**21.5**
Austria										1				1
Belgium		1												1
France				1										1
Germany				3	2			3		5			1	14
Latvia					1									1
Russia		2								1				3
Turkey									0.5					0.5
Middle East														**3**
Saudi Arabia		1								2				3
North & Central America														**62**
Br. West Indies		1												1
Mexico	1	13	16.5			8	1	4	5.5			6	3	58
Trinidad													2	2
USA													1	1
Oceania														**5**
Australia		1			4									5
South America														**36**
Brazil			7				1		22.5				4	34.5
Columbia								0.5						0.5
Guyana										1				1
TOTAL	**1**	**31**	**65.5**	**4**	**11**	**8**	**3**	**15.5**	**31.5**	**21**	**0.5**	**6**	**42**	**240**

Figure 48

Notes on the Data

Overall, Asia still represents the largest source of international students in the elementary and secondary education sector. Nevertheless, Mexico is the country with the single largest proportion of the international students.

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St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

Top Source Countries

	# of Students	% of Total (n = 240)
1 Mexico	58	24%
2 Hong Kong	30.5	13%
3 South Korea	26.5	11%
4 Taiwan	22	9%
5 Japan	15	6%
6 China	8.5	4%
TOTAL	**160.5**	**67%**

Figure 49

The top source country for students studying at the elementary and secondary level was Mexico (24%) followed by Hong Kong (13%), South Korea (11%), and Taiwan (9%).

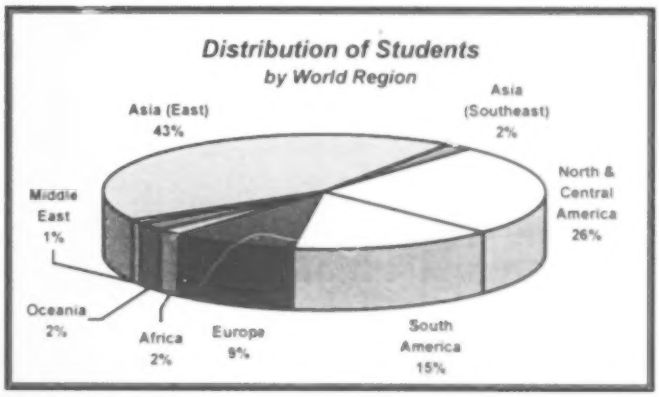

Figure 50

Forty-five percent of international students studying at the elementary and secondary level in Manitoba came from Asia. Students from North and Central America were the second-largest contingent (26%) followed by students from South America (15%) and Europe (9%).

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St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

2. International Exchange Students

(a) Students Enrolled for One Academic Year

Exchange Students Enrolled for One Academic Year
by School/Division and Level of Study

	Early	Middle	Senior 1	Senior 2	Senior 3	Senior 4	Total
Fort Garry					1		1
Fort La Bosse						1	1
Kelsey						3	3
Lord Selkirk						1	1
Midland					1	2	3
Morris-Macdonald					3	2	5
St. Vital					1	9	10
Turtle Mountain						2	2
UW Collegiate					2	1	3
Whiteshell						1	1
TOTAL	**0**	**0**	**0**	**0**	**8**	**22**	**30**

Figure 51

Exchange Students Enrolled for One Academic Year
by School/Division and Country of Origin

	Fort Garry	Fort la Bosse	Kelsey	Lord Selkirk	Midland	Morris-Macdonald	St. Vital	Turtle Mountain	Whiteshell	UW Collegiate	TOTAL
Asia											**9**
Japan							9				9
Europe											**13**
Belgium			1								1
Finalnd						1					1
France						1					1
Germany		1	1		3	2		2	1		10
North & Central America											**5**
Mexico	1					1				3	5
South America											**3**
Brazil				1			1				2
Venezuela			1								1
TOTAL	**1**	**1**	**3**	**1**	**3**	**5**	**10**	**2**	**1**	**3**	**30**

Figure 52

Notes on the Data

There is insufficient data to warrant a detailed analysis of International Exchange students enrolled for one academic year. For analyses of consolidated numbers of International Exchange Students, please see Part 2 (d) of this sub-section, "Consolidated Student Numbers."

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
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UW Collegiate – University of Winnipeg Collegiate

2. International Exchange Students

(b) Students Enrolled for One Semester/Term/Half-Year

Exchange Students Enrolled for One Semester/Term/Half-Year
by School/Division and Level of Study

	Early	Middle	Senior 1	Senior 2	Senior 3	Senior 4	TOTAL
Fort La Bosse					2		2
Kelsey					1	1	2
Morris-Macdonald				1			1
TOTAL	**0**	**0**	**0**	**1**	**3**	**1**	**5**

Figure 53

Exchange Students Enrolled for One Semester/Term/Half-Year
by School/Division and Country of Origin

	Fort la Bosse	Kelsey	Morris-Macdonald	TOTAL
Asia				**1**
Japan			1	1
Oceania				**2**
Australia	1	1		2
South America				**2**
Brazil		1		1
Columbia	1			1
TOTAL	**2**	**2**	**1**	**5**

Figure 54

Notes on the Data

There is insufficient data to warrant a detailed analysis of International Exchange students enrolled for one semester/term/half-year.

For analyses of consolidated numbers of International Exchange Students, please see Part 2 (d) of this sub-section, "Consolidated Student Numbers."

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations:

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UW Collegiate – University of Winnipeg Collegiate

2. International Exchange Students

(c) Students Enrolled for Less Than One Semester/Term/Half-Year

Exchange Students Enrolled for Less Than One Semester/Term/Half-Year
by School/Division and Level of Study

	Early	Middle	Senior 1	Senior 2	Senior 3	Senior 4	Total
Fort Garry			18				18
TOTAL	**0**	**0**	**18**	**0**	**0**	**0**	**18**

Figure 55

Exchange Students Enrolled for Less Than One Semester/Term/Half-Year
by School/Division and Country of Origin

	Fort Garry	TOTAL
Europe		**18**
Germany	18	18
TOTAL	**18**	**18**

Figure 56

Notes on the Data

There is insufficient data to warrant a detailed analysis of International Exchange students enrolled for less than one semester/term/half-year.

For analyses of consolidated numbers of International Exchange Students, please see Part 2 (d) of this sub-section, "Consolidated Student Numbers."

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
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St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

2. International Exchange Students

(d) Consolidated Student Numbers

Consolidated Data Exchange Student Enrollments
by School/Division and Level of Study

	Early	Middle	Senior 1	Senior 2	Senior 3	Senior 4	Total
Fort Garry			4.5		1		**5.5**
Fort La Bosse					1	1	**2**
Kelsey					0.5	3.5	**4**
Lord Selkirk						1	**1**
Midland					1	2	**3**
Morris-Macdonald				0.5	3	2	**5.5**
St. Vital					1	9	**10**
Turtle Mountain						2	**2**
UW Collegiate					2	1	**3**
Whiteshell						1	**1**
TOTAL	**0**	**0**	**4.5**	**0.5**	**9.5**	**22.5**	**37**

Figure 57

Notes on the Data

If the number of students enrolled for one semester/term/half-year is multiplied by a factor of ½, and the number of students enrolled for less than one semester/term/half-year is multiplied by a factor of ¼, a rough approximation between these students and the one-year students can be made. These numbers can thus be added to the overall total. The table above and subsequent tables and graphs below reflect these consolidated numbers.

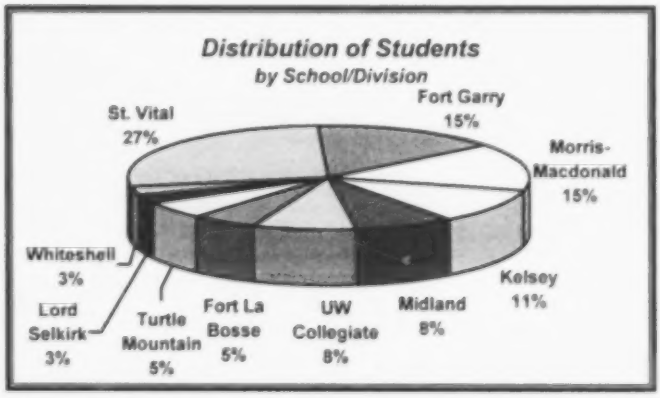

Figure 58

Over one-quarter of exchange students (27%) attended St. Vital while Fort Garry and Morris-Macdonald each had 15%. Kelsey had the next largest share of exchange students with 11%, followed by Midland and UW Collegiate with 8% each. Fort la Bosse and Turtle Mountain each had 5% of these students.

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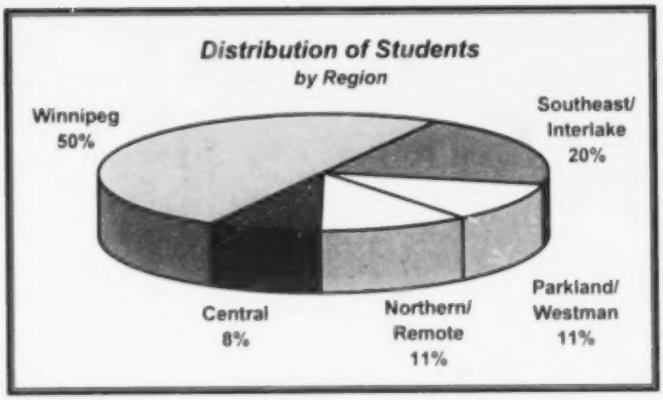

Figure 59

Winnipeg had half (50%) of the international exchange students at the elementary and secondary levels in Manitoba. The Northern/Remote region makes its initial appearance in the international education sector by holding 11% of the exchange student population, all of which was in Kelsey.

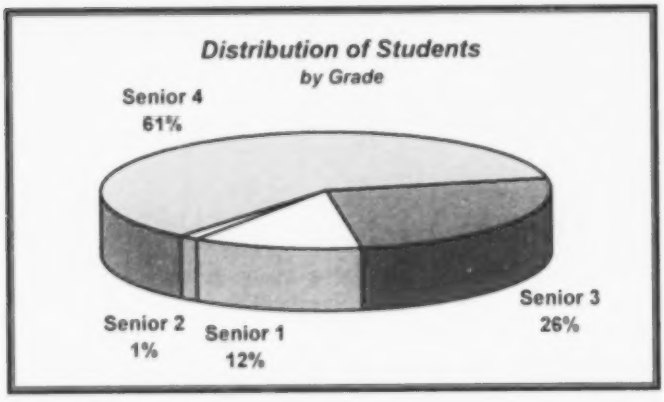

Figure 60

Combined, over four-fifths (87%) of Manitoba's exchange students in 2000/01 studied at the Senior 4 (61%) and Senior 3 (26%) levels. The next largest level of study was the Senior 1 level with 12% of students. There were no exchange students below the Senior 1 level.

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St. John's – St. John's-Ravenscourt School

UW Collegiate – University of Winnipeg Collegiate

Consolidated Data Exchange Student Enrollments
by School/Division and Country of Origin

	Fort Garry	Fort la Bosse	Kelsey	Lord Selkirk	Midland	Morris-Macdonald	St. Vital	Turtle Mountain	Whiteshell	UW Collegiate	TOTAL
Asia											**9.5**
Japan						0.5	9				9.5
Europe											**17.5**
Belgium			1								1
Finalnd						1					1
France						1					1
Germany	4.5	1	1		3	2		2	1		14.5
North & Central America											**5**
Mexico	1					1				3	5
Oceania											**1**
Australia		0.5	0.5								1
South America											**4**
Brazil			0.5	1			1				2.5
Columbia		0.5									0.5
Venezuela			1								1
TOTAL	**5.5**	**2**	**4**	**1**	**3**	**5.5**	**10**	**2**	**1**	**3**	**37**

Figure 61

Notes on the Data

If the number of students enrolled for one semester/term/half-year is multiplied by a factor of ½, and the number of students enrolled for less than one semester/term/half-year is multiplied by a factor of ¼, a rough comparison between these students and the one-year students can be made. These numbers can thus be added to the overall total. Figures 61 - 63 reflect these consolidated numbers.

Top Source Countries

	# of Students	% of Total (n = 37)
1 Germany	14.5	39%
2 Japan	9.5	26%
3 Mexico	5	14%
4 Brazil	2.5	7%
TOTAL	**31.5**	**85%**

Figure 62

The two top source countries for exchange students were Germany (39%) and Japan (26%).

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
St. James – St. James-Assiniboia (School Division)
St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

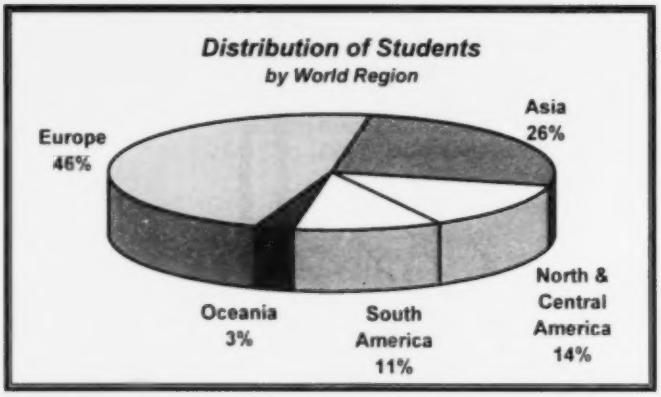

Figure 63

Close to half (46%) of international exchange students studying at the elementary and secondary levels in Manitoba came from Europe. Students from Asia were the second-largest contingent (26%) followed by students from North and Central America (14%). There were no students from Africa or the Middle East.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

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St. James – St. James-Assiniboia (School Division)

St. John's – St. John's-Ravenscourt School

UW Collegiate – University of Winnipeg Collegiate

3. International ESL Students

(a) Students Enrolled for Twelve Weeks or Less

ESL Students Enrolled for Twelve Weeks or Less
by School/Division and Country of Origin

	Balmoral Hall	Fort Garry	Garden Valley	St. Vital	TOTAL
Asia					**61**
Hong Kong		2			2
Japan	6	50		2	58
Korea		1			1
Europe					**2**
Germany			1		1
Switzerland		1			1
TOTAL	**6**	**54**	**1**	**2**	**63**

Figure 64

Notes on the Data

There were 63 international students enrolled in ESL programs of 12 weeks or less during the 2000/01 academic year. Fort Garry held the dominant share of these students (54 out of 63 or 85.7%). Almost all of these students (58 out of 63 or 92.1%) came from Japan. Most of these students (52 out of 63 or 82.5%) were the product of partnership arrangements with foreign schools. There is insufficient data for further analysis.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
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3. International ESL Students

(b) Students Enrolled for More Than Twelve Weeks

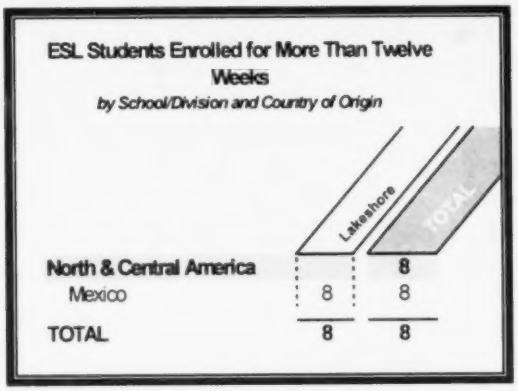

Figure 65

Notes on the Data

There were 8 international students enrolled in ESL programs of more than 12 weeks during the 2000/01 academic year. All of them came from Mexico. There is insufficient data for further analysis.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
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St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

4. Short-term International Students

Short-term International Students
by School/Division and Country of Origin

	Fort Garry	River East	TOTAL
Asia			**9**
Hong Kong		1	1
Korea	5	3	8
Europe			**2**
Yugoslavia		2	2
North & Central America			**2**
Guatemala	2		2
TOTAL	**7**	**6**	**13**

Figure 66

Notes on the Data

There were 13 international students enrolled in non-ESL programs of 12 weeks or less during the 2000/01 academic year. There is insufficient data for further analysis.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
St. James – St. James-Assiniboia (School Division)
St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

PART B – POTENTIAL CAPACITY

Estimating student capacity is a complex task based on many variables including program flexibility, types of courses taught, availability of qualified teachers, and sufficient physical space and infrastructure. Capacity can be interpreted in two different ways. It can mean the ability of an institution to admit more students within the existing structures and programs available. On the other hand, it can also mean the ability of an institution to expand its programs to accommodate additional students beyond its current theoretical maximum.

Institutions were asked to assess their potential ability to admit more international students into their programs. This data was then evaluated against their actual international student enrollment to determine their total theoretical capacity and their success in reaching that theoretical capacity.

For the purposes of the analyses in this sub-section, the report will focus on institutions' success in reaching their estimated capacity to immediately enroll international students. It will not focus on their ability to further expand their theoretical capacity through medium- and long-term measures. This section will also explore the barriers that institutions have faced in trying to achieve their maximum enrollment.

1. Overall Potential Capacity

	Grades															Overall
	Early			Middle			Senior 1 - 4			ESL			Short-term			
	x	y	z	x	y	z	x	y	z	x	y	z	x	y	z	
Antler River	-	-	-	-	-	-	1	3	25%	-	-	-	-	-	-	25%
Balmoral Hall	-	-	-	10	65	13%	22	-	100%	6	-	100%	-	-	-	37%
Fort Garry	-	5	0%	2	10	17%	63.5	10	86%	54	20	73%	7	20	26%	66%
Fort La Bosse	-	-	-	-	-	-	-	20	0%	-	-	-	-	-	-	0%
Garden Valley	-	-	-	-	-	-	4	-	100%	1	-	100%	-	-	-	100%
Interlake	-	-	-	-	-	-	11	15	42%	-	-	-	-	-	-	42%
Kelsey	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Lakeshore	-	-	-	-	-	-	8	10	44%	8	-	100%	-	-	-	62%
Lord Selkirk	-	-	-	-	-	-	3	20	13%	-	-	-	-	40	0%	5%
Midland	-	-	-	-	-	-	-	6	0%	-	-	-	-	-	-	0%
Morris-Macdonald	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
River East	-	-	-	-	20	0%	15	80	16%	-	-	-	6	-	100%	17%
St. James-Assiniboia	0.5	-	100%	2.5	-	100%	28.5	-	100%	-	-	-	-	-	-	100%
St. John's Ravenscourt	-	-	-	1	4	20%	20	21	49%	-	-	-	-	-	-	46%
St. Vital	-	10	0%	-	10	0%	0.5	10	5%	2	-	100%	-	-	-	8%
Souris Valley	-	3	0%	1	3	25%	5	5	50%	-	-	-	-	-	-	35%
Transcona-Springfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Turtle Mountain	-	10	0%	-	10	0%	-	25	0%	-	25	0%	-	-	-	0%
UW Collegiate	-	-	-	-	-	-	42	100	30%	-	-	-	-	-	-	30%
Whiteshell	-	15	0%	-	20	0%	-	30	0%	-	-	-	-	-	-	0%
TOTAL	0.5	43	1%	16.5	142	10%	223.5	355	39%	71	45	61%	13	60	18%	33%

x = Actual Enrollment
y = Additional Capacity
z = Percent of Theoretical Maximum Achieved -- calculated as (x/x+y)

Figure 67

Notes on the Data

On average, across all grade levels including ESL and Short-term study arrangements, Manitoba is enrolling international students at the elementary and secondary level to 33% of its total theoretical capacity (i.e. 324.5 students of a potential total of 969.5).

In the above table, numbers used for Early, Middle, and Senior Years are drawn from the consolidated figures in Part B of this report (i.e. they are weighted to reflect length of stay), while numbers used in the ESL and Short-term columns are drawn from unconsolidated figures (i.e. they are not weighted).

An assumption has been made that, where no information has been given on capacity, the additional capacity was assumed to be zero. Where no students were enrolled and no capacity was noted, the division was excluded from analysis in Figures 68 - 70. Thus, Garden Valley is shown as having reached 100% of its capacity while Kelsey was excluded from subsequent charts.

It is important to exercise caution in interpreting this data. Note that while it is important for institutions who have room for more international students to admit more, it is also important for institutions who have reached their capacity to find ways of accommodating a greater number of international students.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
St. James – St. James-Assiniboia (School Division)
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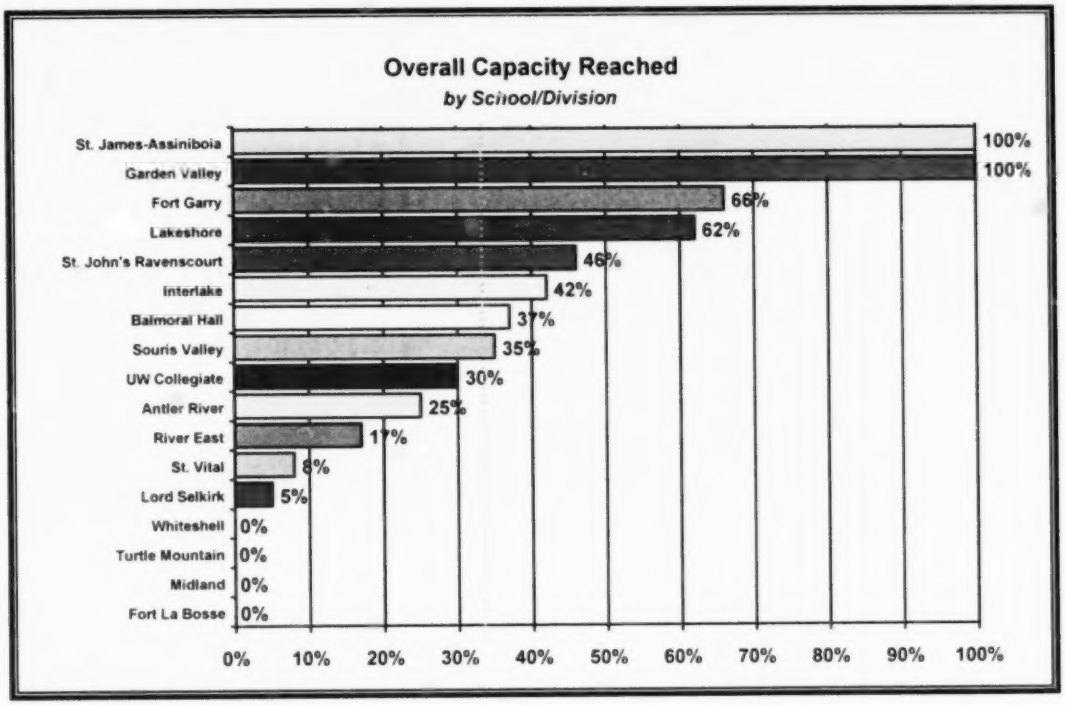

Figure 68

The overall average of 33% of capacity reached is denoted by a dashed line.

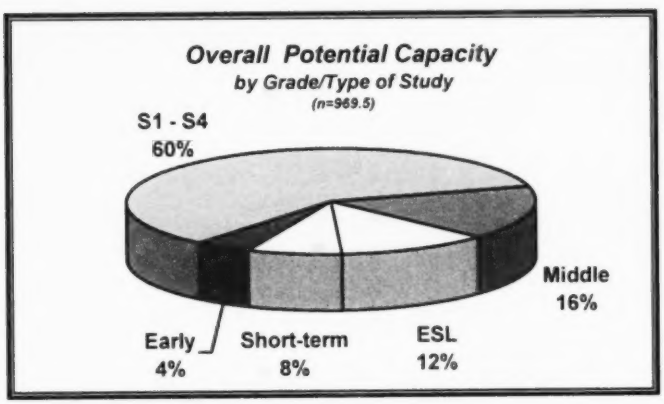

Figure 69

Overall, schools/divisions indicated that the largest capacities for international students were found at the Senior 1 – Senior 4 levels of study – a majority of 60% would be studying at this level if total capacity were reached compared to 16% who would be studying in the Middle Years. ESL would be the third largest group with 12% of international students within schools/divisions studying in this area. International students studying in short-term arrangements or in the Early Years would comprise 8% and 4%, respectively.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

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1. Overall Potential Capacity

	Grades															Overall
	Early			Middle			Senior 1 - 4			ESL			Short-term			
	x	y	z	x	y	z	x	y	z	x	y	z	x	y	z	
Antler River	-	-	-	-	-	-	1	3	25%	-	-	-	-	-	-	25%
Balmoral Hall	-	-	-	10	65	13%	22	-	100%	6	-	100%	-	-	-	37%
Fort Garry	-	5	0%	2	10	17%	63.5	10	86%	54	20	73%	7	20	26%	66%
Fort La Bosse	-	-	-	-	-	-	-	20	0%	-	-	-	-	-	-	0%
Garden Valley	-	-	-	-	-	-	4	-	100%	1	-	100%	-	-	-	100%
Interlake	-	-	-	-	-	-	11	15	42%	-	-	-	-	-	-	42%
Kelsey	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Lakeshore	-	-	-	-	-	-	8	10	44%	8	-	100%	-	-	-	62%
Lord Selkirk	-	-	-	-	-	-	3	20	13%	-	-	-	-	40	0%	5%
Midland	-	-	-	-	-	-	-	6	0%	-	-	-	-	-	-	0%
Morris-Macdonald	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
River East	-	-	-	-	20	0%	15	80	16%	-	-	-	6	-	100%	17%
St. James-Assiniboia	0.5	-	100%	2.5	-	100%	28.5	-	100%	-	-	-	-	-	-	100%
St. John's Ravenscourt	-	-	-	1	4	20%	20	21	49%	-	-	-	-	-	-	46%
St. Vital	-	10	0%	-	10	0%	0.5	10	5%	2	-	100%	-	-	-	8%
Souris Valley	-	3	0%	1	3	25%	5	5	50%	-	-	-	-	-	-	35%
Transcona-Springfield	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0%
Turtle Mountain	-	10	0%	-	10	0%	-	25	0%	-	25	0%	-	-	-	0%
UW Collegiate	-	-	-	-	-	-	42	100	30%	-	-	-	-	-	-	30%
Whiteshell	-	15	0%	-	20	0%	-	30	0%	-	-	-	-	-	-	0%
TOTAL	**0.5**	**43**	**1%**	**16.5**	**142**	**10%**	**223.5**	**355**	**39%**	**71**	**45**	**61%**	**13**	**60**	**18%**	**33%**

x = Actual Enrollment
y = Additional Capacity
z = Percent of Theoretical Maximum Achieved – calculated as (x/x+y)

Figure 67

Notes on the Data

On average, across all grade levels including ESL and Short-term study arrangements, Manitoba is enrolling international students at the elementary and secondary level to 33% of its total theoretical capacity (i.e. 324.5 students of a potential total of 969.5).

In the above table, numbers used for Early, Middle, and Senior Years are drawn from the consolidated figures in Part B of this report (i.e. they are weighted to reflect length of stay), while numbers used in the ESL and Short-term columns are drawn from unconsolidated figures (i.e. they are not weighted).

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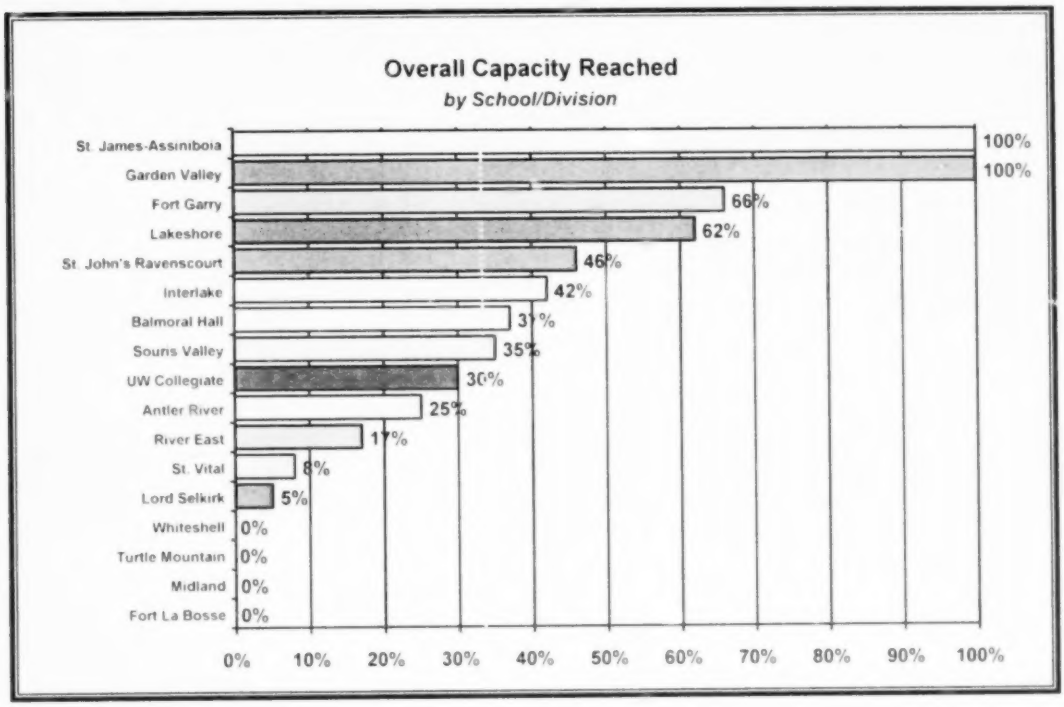

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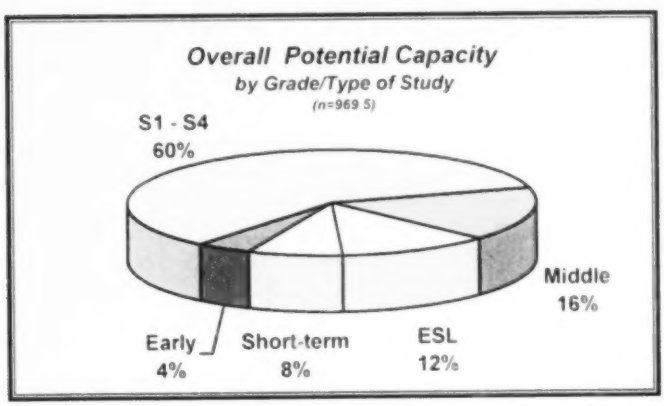

Figure 69

Overall, schools/divisions indicated that the largest capacities for international students were found at the Senior 1 – Senior 4 levels of study – a majority of 60% would be studying at this level if total capacity were reached compared to 16% who would be studying in the Middle Years. ESL would be the third largest group with 12% of international students within schools/divisions studying in this area. International students studying in short-term arrangements or in the Early Years would comprise 8% and 4%, respectively.

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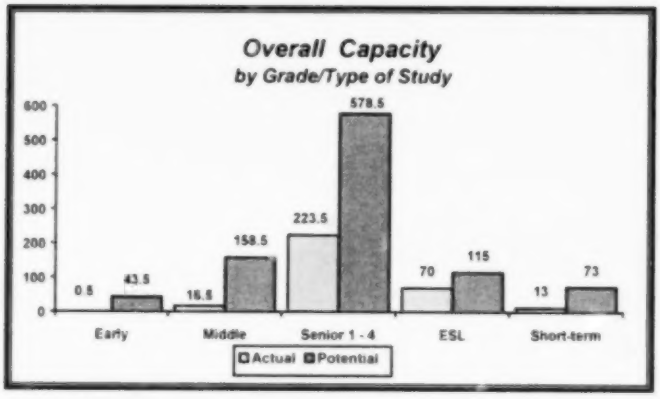

Figure 70

This graph demonstrates actual numbers of students studying in each grade/type of study versus the potential enrollment capacity. It shows that although the Senior 1 – 4 category only enrolled students to 39% of its potential capacity, the actual number of students being enrolled was still larger than all of the other grades/types of study combined – 223.5 to 101, respectively.

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St. John's – St. John's-Ravenscourt School

UW Collegiate – University of Winnipeg Collegiate

2. Barriers to Achieving Greater Capacity

Of the nineteen participating schools/divisions, seven identified obstacles to achieving full capacity. In no particular order, the following summary explains the obstacles to achieving full capacity that the institutions said they faced.

Securing Homestay Families – Difficulty in finding sufficient numbers of good homestay families is a challenge for many schools/divisions.

ESL Programs – Being able to offer an ESL program and/or finding ESL teachers was cited as key to being able to achieve greater capacity.

Physical Space – For some schools/divisions, physical space restrictions for either classrooms or residences was also mentioned as a barrier.

Finding Reputable Agents – One school division found it difficult to connect with reputable agents that could aid them with their international student program.

Internal Resources – A lack of internal resources (human, financial) was also mentioned as a factor that was restricting future growth.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations: **Balmoral Hall** – Balmoral Hall School; **St. James** – St. James-Assiniboia (School Division); **St. John's** – St. John's-Ravenscourt School; **UW Collegiate** – University of Winnipeg Collegiate

PART C – STUDENT FEES AND ECONOMIC IMPACT

Schools/Divisions were asked to provide the costs of tuition, accommodation, and all related fees charged to international students. Some of the information has been averaged and used to calculate approximate revenue for each of the institutions.

This data, along with estimated student expenditures, was used to estimate the amount of money that international students inject into the provincial economy.

1. Regular International Students

a) Students Enrolled for One Academic Year

Average Tuition & Fee Revenue
by School/Division

Institution	Average Tuition & Fees	# of Students	Approximate Revenue
Antler River	$0.00	1	$0.00
Balmoral Hall	$15,000.00	30	$450,000.00
Fort Garry	$10,100.00	40	$404,000.00
Fort La Bosse	$6,000.00	0	$0.00
Garden Valley	$23.00	4	$92.00
Interlake	$6,700.00	11	$73,700.00
Lakeshore	$8,300.00	8	$66,400.00
Lord Selkirk	$10,000.00	2	$20,000.00
River East	$10,000.00	12	$120,000.00
St. James	$10,000.00	19	$190,000.00
St. John's	$11,071.00	21	$232,491.00
St. Vital	$5,526.83	0	$0.00
Souris Valley	$8,000.00	6	$48,000.00
Turtle Mountain	$9,250.00	0	$0.00
UW Collegiate	$4,750.00	42	$199,500.00
Whiteshell	$10,000.00	0	$0.00
TOTAL	**$7,795.05 (AVG)**	**196**	**$1,804,183.00**

Figure 71

Notes on the Data

For an analysis of consolidated numbers in the section, please see Part 4 of this sub-section, "Consolidated Student Fee Revenue Numbers."

Where ranges for tuition or fees were given, an average was used.

Schools/Divisions were excluded from Figure 71 if they did not enroll any regular international students for one academic year and did not report or charge tuition or fees.

The numbers include charges related to administrative and participation fees. They do not include accommodation fees, insurance costs, uniform charges, and the like.

St. John's-Ravenscourt does not separate tuition fees from boarding fees as international students are required to be boarders – homestays or living with relatives is not permitted. In consultation with the school, the amount of $11,071 was arrived at for this report only.

1. Regular International Students

(b) Students Enrolled for One Semester/Term/Half-Year

Average Tuition & Fee Revenue

by School/Division

Institution	Average Tuition & Fees	# of Students	Approximate Revenue
Balmoral Hall	$7,575.00	4	$30,300.00
Fort Garry	$5,100.00	51	$260,100.00
Fort La Bosse	$3,000.00	0	$0.00
Lord Selkirk	$5,000.00	2	$10,000.00
River East	$5,000.00	6	$30,000.00
St. Vital	$2,763.42	1	$2,763.42
Souris Valley	$4,000.00	0	$0.00
St. James	$5,000.00	25	$125,000.00
UW Collegiate	$2,375.00	0	$0.00
TOTAL	**$4,423.71 (AVG)**	**89**	**$458,163.42**

Figure 72

Notes on the Data

For an analysis of consolidated numbers in the section, please see Part 4 of this sub-section, "Consolidated Student Fee Revenue Numbers."

Where ranges for tuition or fees were given, an average was used.

Schools/Divisions were excluded from Figure 72 if they did not enroll any regular international students for one academic year and did not report or charge tuition or fees.

The numbers include charges related to administrative and participation fees. They do not include accommodation fees, insurance costs, uniform charges, and the like.

2. International ESL Students

Average Tuition & Fee Revenue
by School/Division

Institution	Average Tuition & Fees	# of Students	Approximate Revenue
Balmoral Hall	$4,545.00	6	$27,270.00
Fort Garry	$1,425.00	54	$76,950.00
Garden Valley	$23.00	1	$23.00
St. Vital	$2,104.50	2	$4,209.00
TOTAL	**$2,024.38 (AVG)**	**63**	**$108,452.00**

Figure 73

Notes on the Data

For an analysis of consolidated numbers in the section, please see Part 4 of this sub-section, "Consolidated Student Fee Revenue Numbers."

Figure 73 includes ESL students who studied for twelve weeks or less (also see Figure 64). There were eight international ESL students who studied for more than twelve weeks who have been excluded from the analysis in this sub-section.

Where ranges for tuition or fees were given, an average was used.

Schools/Divisions were excluded from Figure 73 if they did not enroll any regular international students for one academic year and did not report or charge tuition or fees.

The numbers include charges related to administrative and participation fees. They do not include accommodation fees, insurance costs, uniform charges, et cetera.

Note that the fees charged by Fort Garry are based on 3 weeks. Balmoral Hall and St. Vital's fees are pro-rated to a 12-week equivalent.

3. Short-term Students

Average Tuition & Fee Revenue
by School/Division

Institution	Average Tuition & Fees	# of Students	Approximate Revenue
Fort Garry	$1,900.00	7	$13,300.00
River East	$1,000.00	6	$6,000.00
TOTAL	**$1,450.00 (AVG)**	**13**	**$19,300.00**

Figure 74

Notes on the Data

For an analysis of consolidated numbers in the section, please see Part 4 of this sub-section, "Consolidated Student Fee Revenue Numbers."

Where ranges for tuition fees were given, an average was used. Calculations in this part of the report are based on a four-week/one month program.

Schools/Divisions were excluded from Figure 74 if they did not enroll any regular international students for one academic year and did not report or charge tuition or fees.

The numbers include charges related to administrative and participation fees. They do not include accommodation fees, insurance costs, uniform charges, et cetera.

4. Consolidated Student Fee Revenue

Estimated Tuition & Fee Revenue
by School/Division

Institution	# of Students	Total Estimated Revenue	% of Overall Revenue
Antler River	1	$0.00	0.0%
Balmoral Hall	40	$507,570.00	21.2%
Fort Garry	152	$754,350.00	31.6%
Fort La Bosse	0	$0.00	0.0%
Garden Valley	5	$115.00	0.0%
Interlake	11	$73,700.00	3.1%
Lakeshore	8	$66,400.00	2.8%
Lord Selkirk	4	$30,000.00	1.3%
River East	24	$156,000.00	6.5%
St. James	44	$315,000.00	13.2%
St. John's	21	$232,491.00	9.7%
St. Vital	3	$6,972.42	0.3%
Souris Valley	6	$48,000.00	2.0%
Turtle Mountain	0	$0.00	0.0%
UW Collegiate	42	$199,500.00	8.3%
Whiteshell	0	$0.00	0.0%
TOTAL	**361**	**$2,390,098.42**	**100.0%**

Figure 75

Manitoba schools/divisions generated $2.4 million of revenue from 361 students.

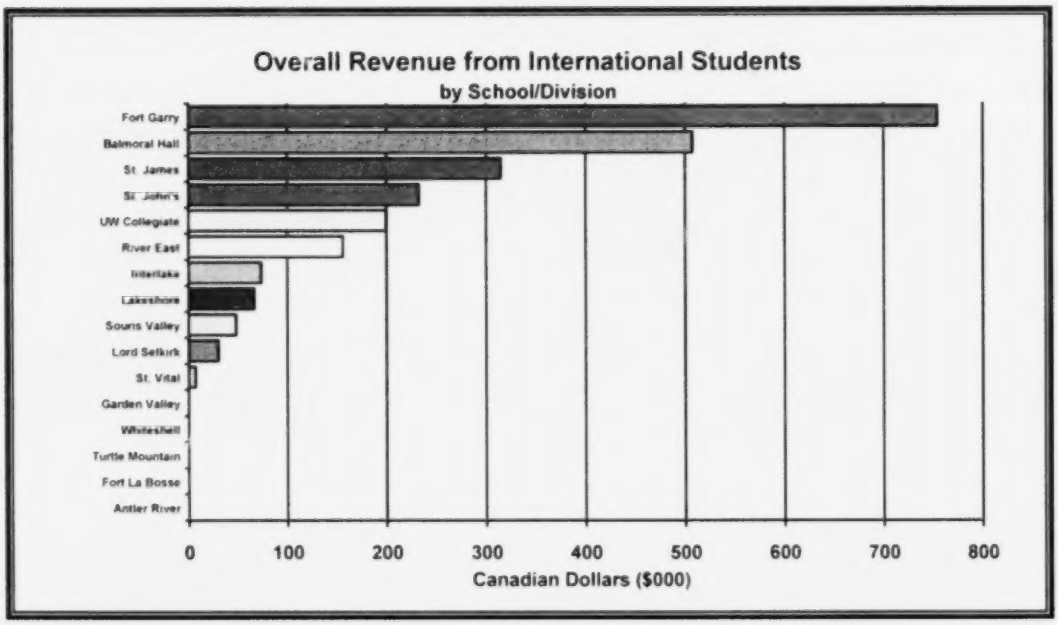

Figure 76

Fort Garry was the highest revenue generator, garnering over $754 K in tuition and fees from international students.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School
St. James – St. James-Assiniboia (School Division)
St. John's – St. John's-Ravenscourt School
UW Collegiate – University of Winnipeg Collegiate

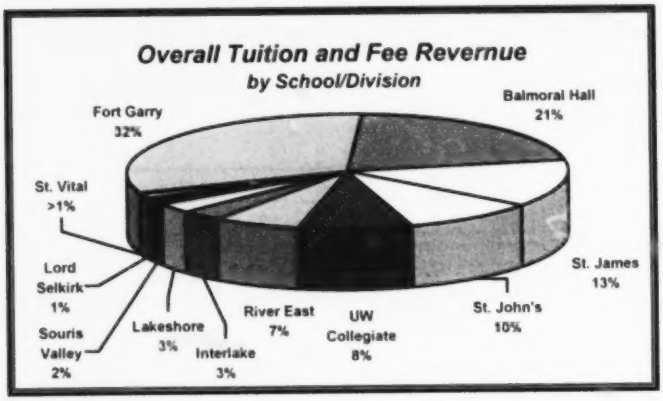

Figure 77

Of the $2.4 million in international student tuition and fees generated by Manitoba schools/divisions, Fort Garry is responsible for almost one-third (32%). Balmoral Hall generated over one-fifth (21%) of the total revenue, followed by St. James (13%) and St. John's-Ravenscourt (10%), and River East (7%).

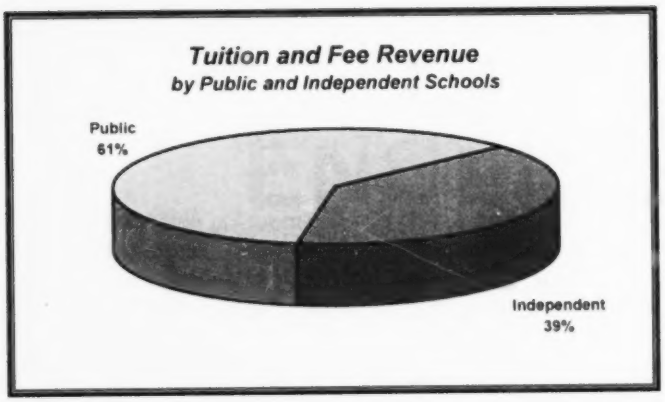

Figure 78

After combining the revenue figures for all types of international students in Manitoba's schools/divisions, the total revenue from public schools/divisions was $1,450,537.42, or 61% of the total revenue. Independent school revenue was $939,561.00, or 39% of the total revenue in this sector.

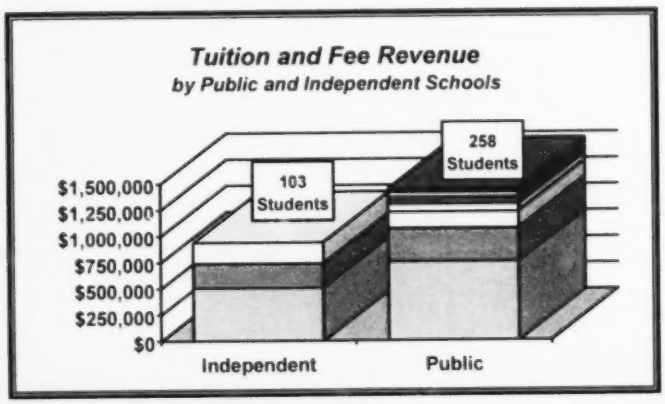

Figure 79

Public schools/divisions garnered $1,450,537.42 from 258 students versus independent schools' revenue of $939,561.00 from 103 students. Independent schools average revenue per student is $7,340.32 compared to public schools/divisions average per student revenue of $6,225.48.

The full name of schools and school divisions are provided throughout the report with the exception of the following occasionally-used abbreviations

Balmoral Hall – Balmoral Hall School

St. James – St. James-Assiniboia (School Division)

St. John's – St. John's-Ravenscourt School

UW Collegiate – University of Winnipeg Collegiate

5. Economic Impact

Estimated Economic Impact		
A	Number of Regular International Students (Consolidated)	240.5
B	Estimated Length of Study	10 months
C	Number of ESL and Short-term Students	84
D	Estimated Length of Study	2 months
E	Monthly Student Spending*	$1,100.00
F	Total Student Spending ((A x B + C x D) x E)	$2,830,300.00
G	Total Tuition Fee Revenue	$2,390,098.42
H	Total Economic Impact (F + G)	$5,220,398.42
I	Direct Value-Added Multiplier**	1.09
J	**TOTAL VALUE-ADDED ECONOMIC IMPACT**	**$5,690,234.28**

Figure 80

Notes on the Data

*Includes estimates of average spending on accommodation, food, clothing, transportation, entertainment, and miscellaneous incidentals.

**Value-added measurement of impact is calculated using a ratio of 1.09, meaning that for every dollar spent by an international student, there is a $1.09 impact on the province. This approach is used to measure other sectors of Manitoba's economy and is in use in other provinces to measure one form of the economic impact of international students.

Section IV

THE LANGUAGE SECTOR

ENGLISH AS A SECOND LANGUAGE SCHOOLS

PART A – STUDENT NUMBERS

ESL schools in Manitoba were asked to give information for two categories of students: those who were enrolled for 12 weeks or less (and therefore did not require a Student Authorization) and those who were enrolled for more than 12 weeks (and therefore did require a Student Authorization).

ESL schools were also asked to provide definitions for their academic year, semesters/terms, and the number and type of ESL programs that they operated. This information was used to check the compatibility of the data in order to ensure accurate and appropriate statistical comparisons.

With the exception of Applied Linguistics Centre, Heartland International, and Providence College and Seminary, all ESL schools in this section are considered public institutions.

The University of Manitoba has two ESL schools. The English Language Services (UM-ELS) program offers short-term programming in conversational English at various levels, and it would be an exception for any of these students to enter a degree program. The English Language Centre (UM-ELC) offers English for academic purposes and is linked to the university's student recruitment program. These students, with the exception of English, are otherwise qualified to enter academic programs.

1. Students Enrolled for Twelve Weeks or Less

ESL Students Enrolled for Twelve Weeks or Less
by ESL School and Country of Origin

	ALC	BU	Heartland	Providence	RRC	UM-ELC	UM-ELS	UW	TOTAL
Africa									**5**
Mali			4						4
Morocco		1							1
Asia									**718**
East Asia									***705***
China		9			1	72			82
Japan		1	43			23	160	20	247
South Korea	16	6	54			51	130		257
Taiwan		6	7			5	101		119
South Asia									***1***
Bangladesh		1							1
Southeast Asia									***12***
Indonesia						4			4
Malaysia						3			3
Thailand						2			2
Vietnam						3			3
Europe									**10**
Germany						2			2
Poland			3						3
Russia						1			1
Turkey						3			3
Ukraine						1			1
Middle East									**7**
Saudi Arabia						7			7
North & Central America									**207**
El Salvador						1			1
Mexico		1	19			8	163	15	206
South America									**53**
Brazil			4						4
Columbia						3			3
Other							46		46
Other									**62**
Other			12			16	34		62
TOTAL	**16**	**25**	**146**	**0**	**1**	**205**	**634**	**35**	**1062**

Figure 81

Institutional Abbreviations

ALC – Applied Linguistics Centre

BU – Brandon University

Heartland – Heartland International English School

Providence – Providence College and Seminary

RRC – Red River College

UM-ELC – University of Manitoba English Language Centre

UM-ELS – University of Manitoba English Language Studies

UW – University of Winnipeg English Language Program

Notes on the Data

Some country of origin breakdowns from ALC, Heartland, and UM-ELC are derived all or in part from ratios versus actual numbers. In addition, UM-ELS noted that "each 8-week registration counts as 1 student." Based on this, it should be noted that the numbers used in Figures 81 - 85 will be close, but not identical to, the actual number of students that attended ESL schools for twelve weeks or less.

Students enrolled at UM-ELC for less than twelve weeks studied 27 hours spread over nine weeks while most other ESL students attending for less than twelve weeks have a much higher workload (e.g. 25 hours per week for each week of study).

Where the country of origin is listed as "other" the student origins were either unknown or not provided.

For analyses of consolidated numbers of ESL students, please see the Part 3 of this sub-section, "Consolidated Student Numbers."

Top Source Countries

	# of Students	% of Total (n = 1062)
1 South Korea	257	24%
2 Japan	247	23%
3 Mexico	206	19%
4 Taiwan	119	11%
5 China	81	8%
TOTAL	**910**	**86%**

Figure 82

Almost one-quarter (24%) of ESL students attending ESL schools for 12 weeks or less came from South Korea, followed closely by Japan (23%). The top five source countries account for 86% of the 1,062 ESL students that studied for 12 weeks or less.

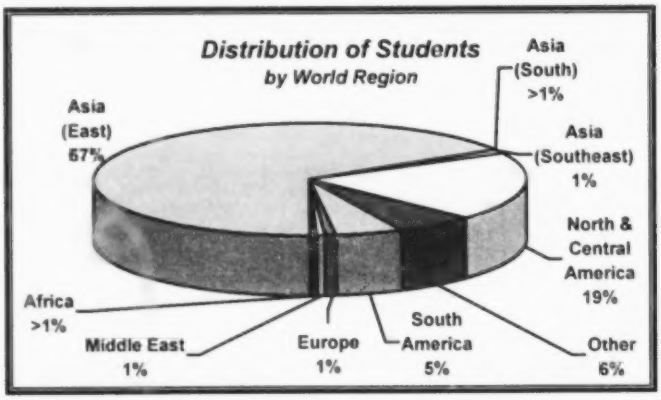

Figure 83

A strong majority (68%) of international students in ESL schools for 12 weeks or less were from Asia. Nineteen percent came from North and Central America.

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UW – University of Winnipeg English Language Program

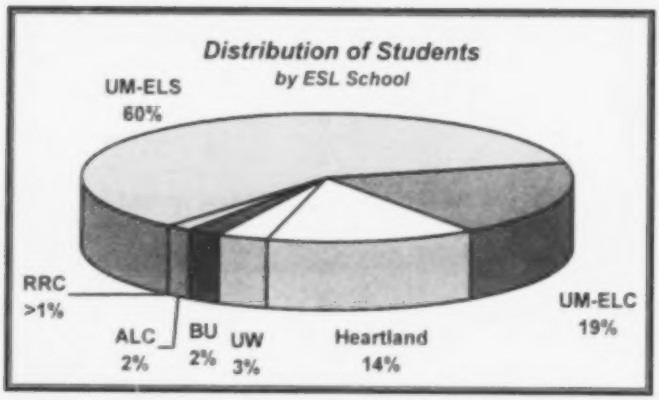

Figure 84

Sixty percent of international students in ESL schools for 12 weeks or less were enrolled at UM-ELS followed by 19% enrolled at UM-ELC. Heartland enrolled 14% of these students.

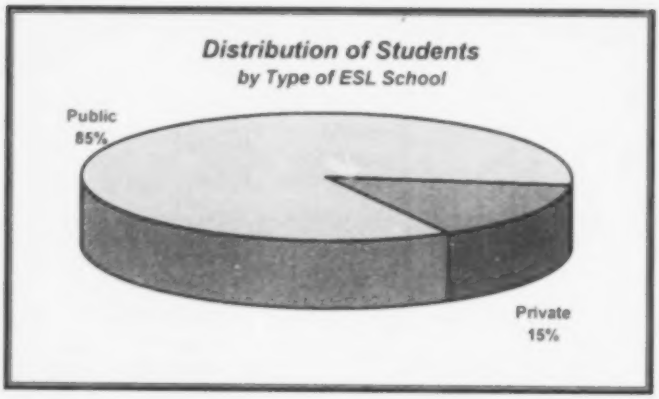

Figure 85

Eighty-five percent of international students in ESL schools for 12 weeks or less were enrolled in public schools.

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RRC – Red River College
UM-ELC – University of Manitoba English Language Centre
UM-ELS – University of Manitoba English Language Studies
UW – University of Winnipeg English Language Program

2. Students Enrolled for More Than Twelve Weeks

Students Enrolled for More Than Twelve Weeks
by ESL School and Country of Origin

	ALC	BU	Heartland	Providence	RRC	UM-ELC	UM-ELS	UW	TOTAL
Africa									**3**
Libya								1	1
Mali			1						1
Tanzania					1				1
Asia									**839**
East Asia									***817***
China				1	2	132		90	225
Hong Kong				2				5	7
Japan	32		10		6	42		70	160
South Korea	126		13	12	34	93		112	390
Taiwan	2		2		1	4		26	35
South Asia									***2***
Pakistan								1	1
Sri Lanka								1	1
Southeast Asia									***20***
Indonesia					1	3			4
Malaysia						2			2
Thailand					1	2		9	12
Vietnam						2			2
Europe									**19**
Austria					2				2
France								5	5
Germany						2			2
Poland			1		1				2
Portugal					1				1
Russia						1		1	2
Turkey						2		1	3
Ukraine						1		1	2
Middle East									**16**
Israel								1	1
Saudi Arabia					1	13		1	15
North & Central America									**73**
Cuba								1	1
El Salvador						1			1
Mexico			4			15		52	71
South America									**32**
Argentina								1	1
Brazil	2		1	1				21	25
Chile								1	1
Columbia						2		2	4
Venezuela								1	1
Other									**18**
Other			2			16			18
TOTAL	**162**	**0**	**34**	**16**	**51**	**333**	**0**	**404**	**1000**

Figure 86

Institutional Abbreviations

ALC – Applied Linguistics Centre

BU – Brandon University

Heartland – Heartland International English School

Providence – Providence College and Seminary

RRC – Red River College

UM-ELC – University of Manitoba English Language Centre

UM-ELS – University of Manitoba English Language Studies

UW – University of Winnipeg English Language Program

Notes on the Data

Some country of origin breakdowns from ALC, Heartland, and UM-ELC are derived all or in part from ratios versus actual numbers. Based on this, it should be noted that the numbers used in Figures 87 - 90 will be close, but not identical to, the actual number of students that attended ESL schools under this category.

Where the country of origin is listed as "other" the student origins were either unknown or not provided.

For analyses of consolidated numbers of ESL students, please see the Part 3 of this sub-section, "Consolidated Student Numbers."

Top Source Countries

	# of Students	% of Total (n = 1000)
1 South Korea	390	39%
2 China	225	23%
3 Japan	160	16%
4 Mexico	71	7%
TOTAL	**846**	**85%**

Figure 87

Thirty-nine percent of ESL students attending school for more than 12 weeks came from South Korea followed by China (23%). The top four source countries accounted for 85% of the total number of these students.

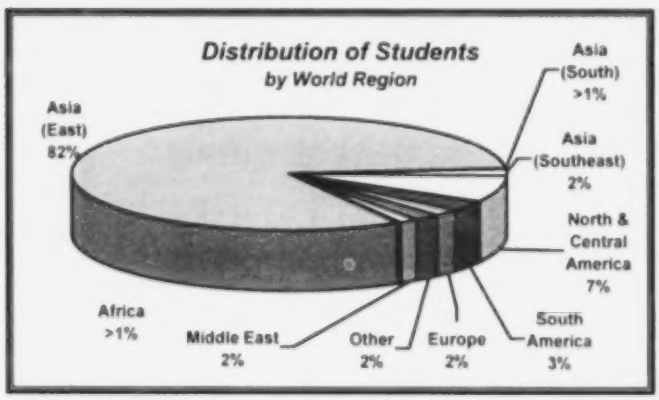

Figure 88

A very strong majority (84%) of international students in ESL schools for more than 12 weeks are from Asia. Seven percent came from North and Central America and 3% came from South America.

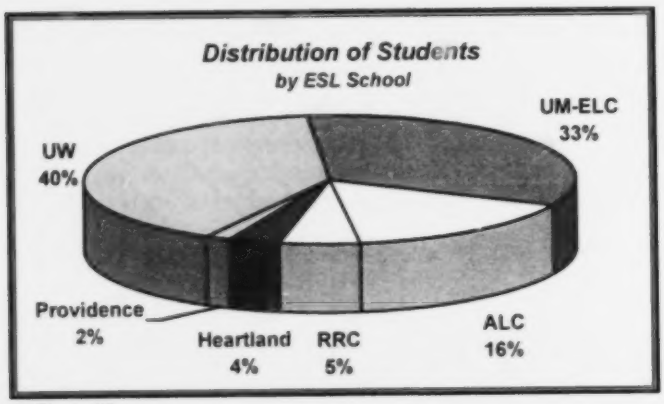

Figure 89

Forty percent of international students in ESL schools for more than 12 weeks were enrolled at UW. UM-ELC enrolled one-third (33%) and ALC enrolled 16%.

Providence is the only ESL school outside of Winnipeg that enrolled international ESL students for more than 12 weeks.

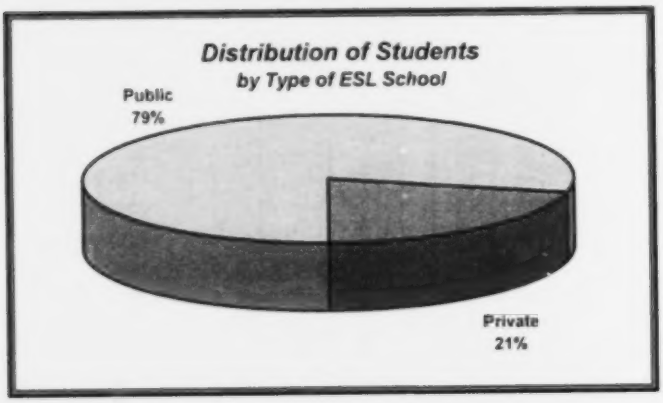

Figure 90

Almost four-fifths (79%) of international students in ESL schools for more than 12 weeks were enrolled in public schools.

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UM-ELS – University of Manitoba English Language Studies
UW – University of Winnipeg English Language Program

3. Consolidated Student Numbers – All ESL Students

Consolidated Data on ESL Student Enrollments
by ESL School and Country of Origin

	ALC	BU	Heartland	Providence	RRC	UM-ELC	UM-ELS	UW	TOTAL
Africa									**7**
Mali			5						5
Morocco		1							1
Tanzania					1				1
Asia									**1557**
East Asia									***1522***
China		9		1	3	204		90	307
Hong Kong				2				5	7
Japan	32	1	53		6	65	160	90	407
South Korea	142	6	67	12	34	144	130	112	647
Taiwan	2	6	9		1	9	101	26	154
South Asia									***3***
Bangladesh		1							1
Pakistan								1	1
Sri Lanka								1	1
Southeast Asia									***32***
Indonesia					1	7			8
Malaysia						5			5
Thailand					1	4		9	14
Vietnam						5			5
Europe									**29**
Austria					2				2
France								5	5
Germany						4			4
Poland			4		1				5
Portugal					1				1
Russia						2		1	3
Turkey						5		1	6
Ukraine						2		1	3
Middle East									**24**
Israel								1	1
Libya								1	1
Saudi Arabia					1	20		1	22
North & Central America									**280**
Cuba								1	1
El Salvador						2			2
Mexico		1	23			23	163	67	277
South America									**85**
Argentina								1	1
Brazil	2		5	1				21	29
Chile								1	1
Columbia						5		2	7
Venezuela								1	1
Other							46		46
Other									**80**
Other			14			32	34		80
TOTAL	**178**	**25**	**180**	**16**	**52**	**538**	**634**	**439**	**2062**

Figure 91

Institutional Abbreviations

ALC – Applied Linguistics Centre
BU – Brandon University
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RRC – Red River College
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UM-ELS – University of Manitoba English Language Studies
UW – University of Winnipeg English Language Program

Notes on the Data

Some breakdowns from ALC, Heartland, and UM-ELC are derived all or in part from ratios versus actual numbers. In addition, UM-ELS noted that "each 8-week registration counts as 1 student." Based on this, it should be noted that the numbers used in Figures 91 - 95 will be close, but not identical to, the actual number of students that attended ESL schools under this category.

Where the country of origin is listed as "other" the student origins were either unknown or not provided.

Unlike other sections of this report that analyse consolidated data, the numbers here are not "weighted" to reflect a particular student's length of stay. All students, whether studying for more or less than 12 weeks, are counted in the same way.

Top Source Countries

	# of Students	% of Total (n = 2062)
1 South Korea	647	31%
2 Japan	407	20%
3 China	307	15%
4 Mexico	277	13%
5 Taiwan	154	7%
TOTAL	**1792**	**87%**

Figure 92

Thirty-one percent of ESL students in 2000/01 came from South Korea. The next major sources of ESL students were Japan (20%), China (15%), and Mexico (13%). The top five source countries accounted for 87% of all of the ESL student enrollments in 2000/01.

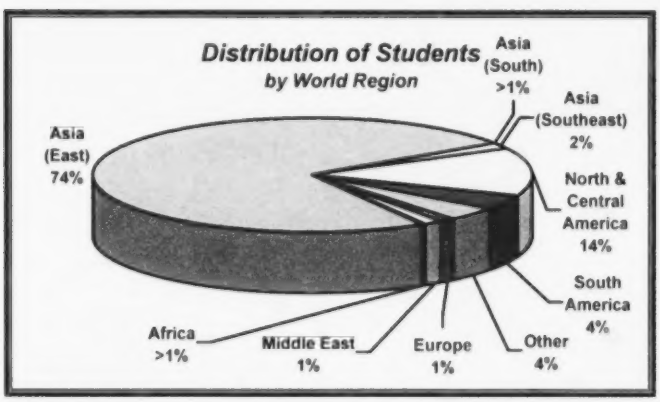

Figure 93

Over three-quarters (76%) of international students in ESL schools in 2000/01 were from Asia. Fourteen percent of students came from North and Central America and 4% came from South America.

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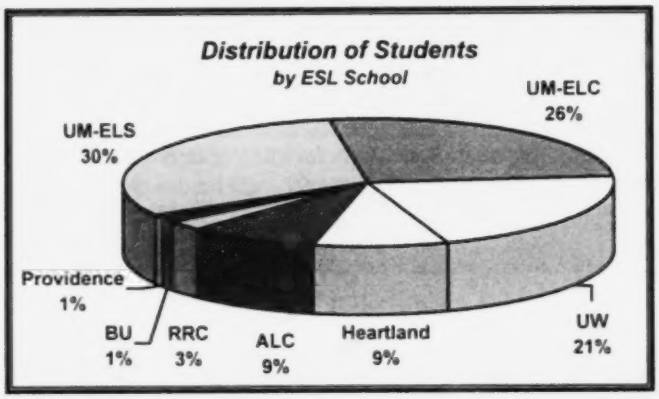

Figure 94

Thirty percent of international ESL students in Manitoba were enrolled at UM-ELS followed by UM-ELC, which enrolled 26% of these students. UW enrolled over one-fifth (21%) while Heartland and ALC each enrolled 9%.

Only 2% of students in ESL schools studied outside of Winnipeg. They were at BU (1%) and Providence (1%).

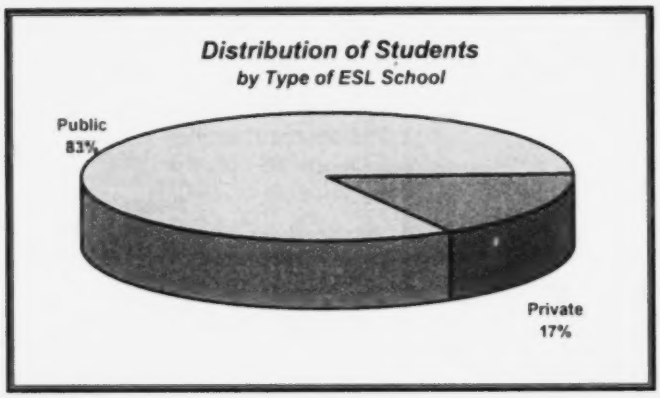

Figure 95

Eighty-three percent of international students in ESL schools in Manitoba were enrolled in public schools.

Institutional Abbreviations

ALC – Applied Linguistics Centre

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UM-ELS – University of Manitoba English Language Studies

UW – University of Winnipeg English Language Program

PART B – POTENTIAL CAPACITY

Many students come to Manitoba for the sole purpose of studying English as a Second Language. Many others, however, require ESL training in order to pursue their degree or diploma programs in Manitoba.

ESL programs are thus a vital conduit for admitting international students to Manitoba's educational institutions. Knowing the ability of ESL schools to admit more students provides a key indicator by which to gauge Manitoba's capacity for growth in the international education sector.

Estimating student capacity is a complex task based on many variables including program flexibility, types of courses taught, availability of qualified teachers, and sufficient physical space and infrastructure. Capacity can be interpreted in two different ways. It can mean the ability of an institution to admit more students within the existing structures and programs available. On the other hand, it can also mean the ability of an institution to expand its programs to accommodate additional students beyond its current theoretical maximum.

Institutions were asked to assess their potential ability to admit more international ESL students into their programs. This data was then evaluated against their actual international ESL student enrollment to determine their total theoretical capacity and their success in reaching that theoretical capacity.

For the purposes of the analyses in this sub-section, the report will focus on institutions' success in reaching their estimated capacity to immediately enroll international students. It will not focus on their ability to further expand their theoretical capacity through medium- and long-term measures. This section will also explore the barriers that institutions have faced in trying to achieve their maximum enrollment.

1. Overall Potential Capacity

	Actual Enrollment (x)	Additional Capacity (y)	Percent of Theoretical Maximum Achieved (x/(x+y))
ALC	178	230	44%
BU	25	45	36%
Heartland	180	320	36%
Providence	16	45	26%
RRC	52	20	72%
UM-ELC*	333	117	74%
UM-ELS	634	250	72%
UW	439	50	90%
TOTAL	**1857**	**1077**	**63%**

Figure 96

Notes on the Data

*UM-ELC provided additional capacity figures only for ESL students studying for more than twelve weeks. As such, ESL students studying for twelve weeks or less were excluded from the *Actual Enrollment* number.

Some ESL schools provided a breakdown of their estimated capacity on a program by program basis. For the purposes of these analyses, all numbers, regardless of type of ESL capacity, have been combined.

In some cases, estimated capacity was provided as a range – in these cases, the range was averaged and that number was used. In other instances, criteria affecting capacity were provided and not actual numbers – in these instances, the number of spaces was estimated in consultation with institutions.

The numbers used for *Actual Enrollment* in Figure 96 were taken from the Consolidated ESL Student Numbers (see sub-section A, Part 3, "Consolidated Student Numbers" in this section of the report).

It is important to exercise caution in interpreting this data. While it is important for institutions who have room for more international students to admit more, it is also important for institutions who have reached their capacity to find ways of accommodating a greater number of international students.

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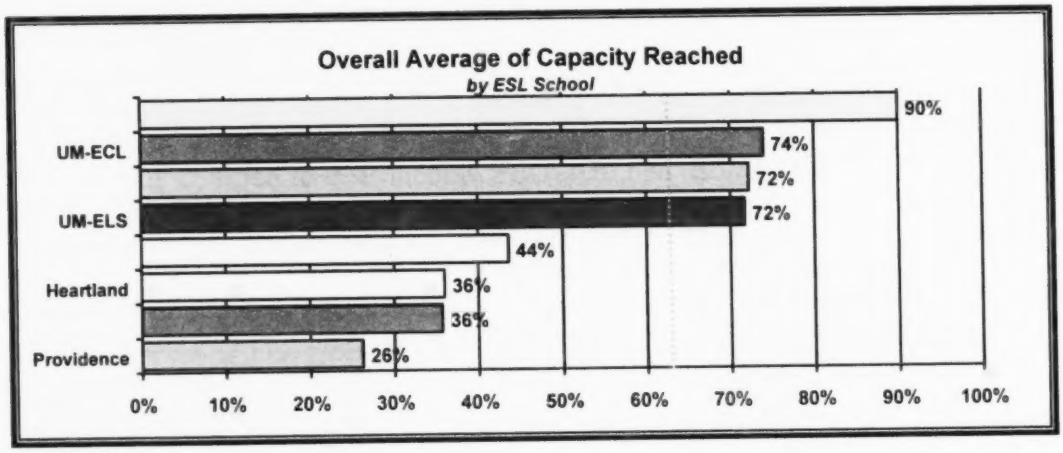

Figure 97

There is a wide disparity between the overall average international ESL student capacity reached by ESL schools in Manitoba during 2000/01. Four of the schools were above the average of 63% of capacity reached (denoted by a dashed line), while 4 were below the average.

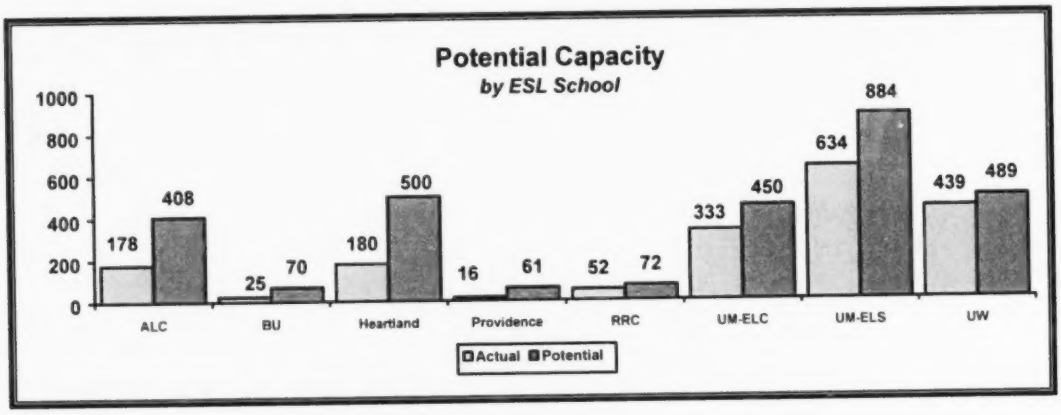

Figure 98

This graph demonstrates actual numbers of students that studied in each ESL school in 2000/01 compared against each schools potential capacity.

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2. Barriers to Achieving Greater Capacity

Of the eight participating ESL schools, five identified obstacles to achieving full capacity. The types of obstacles cited ranged from those completely beyond schools' control to those that could be entirely addressed by the institution. In no particular order, the following summary explains the obstacles to achieving full capacity that the institutions said they face.

Immigration Policies – Obtaining visas for international students can be a significant challenge that depends upon several variables (e.g. course of study, country of origin, etc). Much of this is controlled and administered under federal legislation and is beyond the direct control of the ESL schools and the Government of Manitoba.

Physical Space – Insufficient physical space is an obvious obstacle, but it is one that is almost entirely within each institution's purview to meet. This is not to say that the challenge is insignificant: many internal barriers may prevent the acquisition of more space. However, institutions for the most part have the ability and the authority to address this matter independently.

Recruitment and Admissions – Being able to effectively recruit and quickly enroll students is key to an effective program. Limited financial resources and institutional bureaucracy are significant obstacles, but are also within each institution's control. These obstacles are being addressed in an effective and coordinated way by several institutions where these challenges are present.

Location – Institutions outside of Winnipeg are particularly cognizant of the barrier presented by the physical location of their school campus.

Teachers – Finding ESL teachers on short notice was cited as an obstacle for some, though not all, ESL schools.

Institutional Abbreviations

ALC – Applied Linguistics Centre
BU – Brandon University
Heartland – Heartland International English School
Providence – Providence College and Seminary
RRC – Red River College
UM-ELC – University of Manitoba English Language Centre
UM-ELS – University of Manitoba English Language Studies
UW – University of Winnipeg English Language Program

PART C – STUDENT FEES AND ECONOMIC IMPACT

ESL schools were asked to provide the costs of tuition, accommodation, and all related fees charged to international ESL students. Some of the information has been averaged and used to calculate approximate revenue for each of the institutions.

This data, along with estimated student expenditures, was used to estimate the amount of money that international students inject into the provincial economy. It is only a very rough estimate, however.

1. Overall Student Fees

Estimated Tuition & Fee Revenue
by ESL School

Institution	Average Tuition & Fees	# of Students	Approximate Revenue
ALC	$1,900.00	178	$338,200.00
BU	$2,175.75	25	$54,393.75
Heartland	$1,950.00	180	$351,000.00
Providence	$2,530.00	16	$40,480.00
RRC	$2,400.00	52	$124,800.00
UM-ELC*	$2,538.00	538	$871,804.00
UM-ELS	$2,667.50	634	$1,691,195.00
UW	$1,950.00	439	$856,050.00
TOTAL	**$2,263.91 (AVG)**	**2062**	**$4,327,922.75**

Figure 99

Notes on the Data

*Revenue figures were provided directly from UM-ELC and not estimated.

ESL schools were asked to provide data on their international ESL student tuition and all associated fees for each ESL program they offered. Only UM-ELS and UW had tuition and fees that were different for their various programs. All other ESL schools had one fee regime. In the case of UW, the tuition amount used for this section of this report was based on its general ESL program. In the case of UM-ELS, the tuition was based on the costs for each 8-week session; its contract training could not be calculated against enrollment data and was thus excluded. These and other considerations may result in revenue calculations that are lower than the institutions' actual revenue.

Where institutions provided yearly or monthly tuition costs, they were pro-rated to their three-month (12-week) equivalent for a more reliable comparison. As mentioned above, the tuition for UM-ELS was based on the averaged costs for each 8-week session; all others are based on 12 weeks.

For the purposes of this report, only tuition and related academic fees were included in the calculations for the averages. Examples of costs that were included are application fees, registration fees and library/student fees. Examples of costs that were excluded are residence and homestay charges, insurance, deposits, and homestay placement fees.

Where a range was provided for tuition and associated fees, the costs were averaged.

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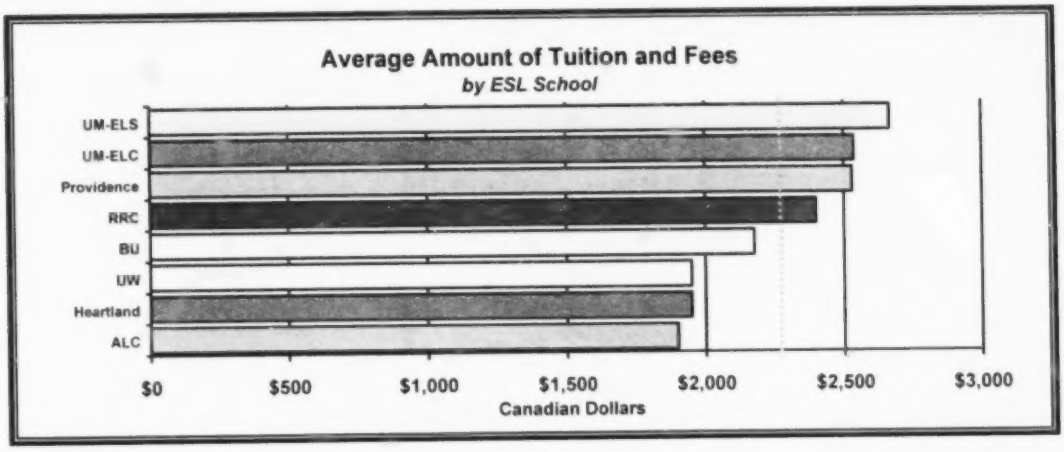

Figure 100

Average costs range from a low of $1,900.00 at ALC to a high of $2,667.50 at UM-ELS. The average tuition and fees between all institutions is $2,263.91 (indicated by dashed line). Four of the eight participating ESL schools charge above this average.

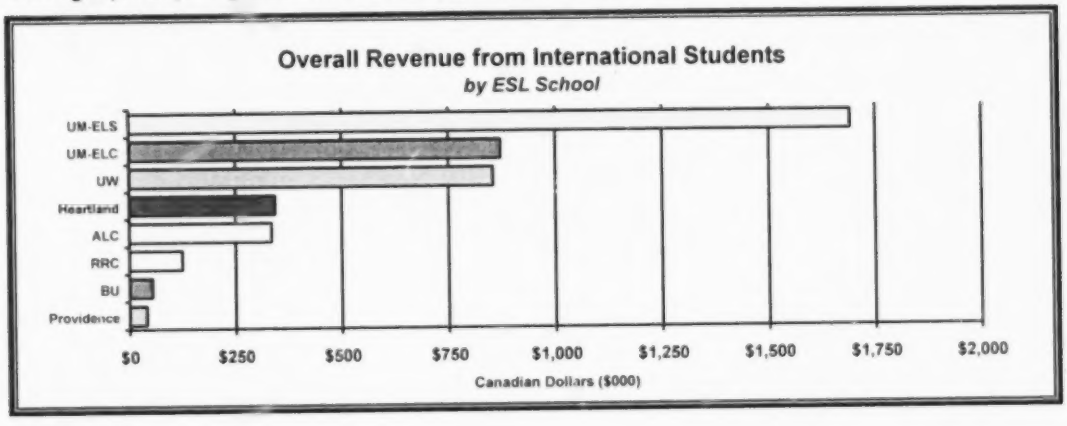

Figure 101

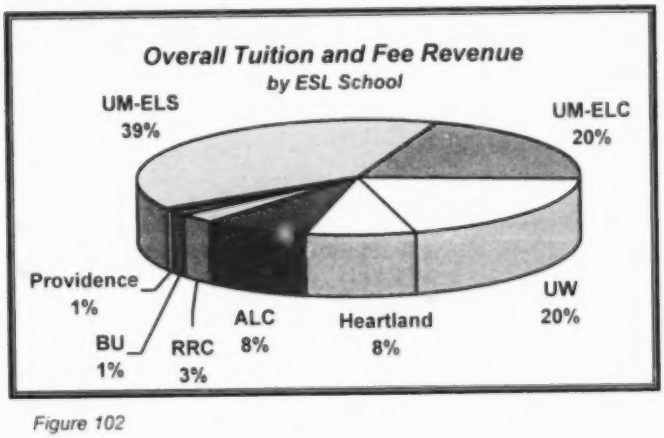

Figure 102

As Figures 101 and 102 demonstrate, UM-ELS generated the highest revenue from international ESL student tuition, garnering $1.69 M or 39% of the total revenue in this sub-sector. This was followed by UM-ELC with $872 K or 20%. UW was the next largest revenue generator at $856 K or 20%. Heartland was the fourth-largest revenue generator and the largest of the private ESL schools with $351 K followed closely by ALC with $338 K.

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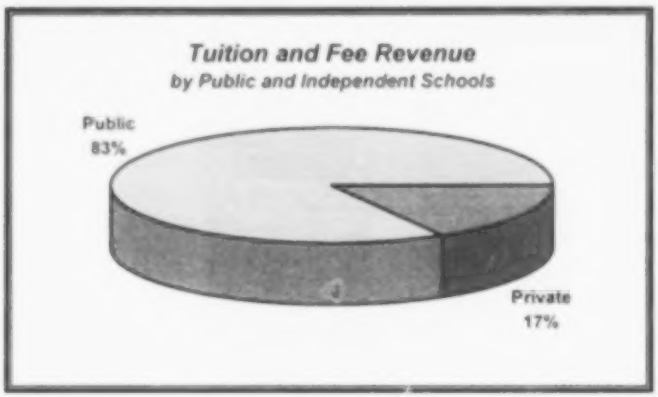

Figure 103

Public ESL schools were responsible for 83% of all provincial revenue generated by ESL schools.

2. Economic Impact

Estimated Economic Impact

A	Number of Students Enrolled for 12 Weeks*	1,223
B	Estimated Length of Study	3 months
C	Number of Students Enrolled for 8 Weeks	634
D	Estimated Length of Study	2 months
E	Monthly Student Spending**	$1,100.00
F	Total Student Spending ((A x B + C x D) x E)	$5,430,700.00
G	Total Tuition Fee Revenue	$4,821,562.75
H	Total Economic Impact (F + G)	$10,252,262.75
I	Direct Value-Added Multiplier***	1.09
J	**TOTAL VALUE-ADDED ECONOMIC IMPACT**	**$11,174,966.40**

Figure 104

Notes on the Data

*All students were assumed to study for three months (as shown in Figure 99). Some may have studied for a shorter period of time, but most would have studied for a longer period of time. Students who attended UM-ELS were separated (see lines C and D in Figure 104) because their numbers were provided on the basis of an eight-week study program. Additionally, students from UM-ELC who studied for less than twelve weeks were excluded from the analysis in Figure 104 as it is not known how many would have already been in Manitoba pursuing a parallel course of study (thereby being included in calculations in other sections of this report.) The sum of these factors suggests that the figures arrived at in Figure 104 are likely lower than the actual economic impact.

**Includes estimates of average spending on accommodation, food, clothing, transportation, entertainment, and miscellaneous incidentals.

***Value-added measurement of impact is calculated using a ratio of 1.09, meaning that for every dollar spent by an international student, there is a $1.09 impact on the province. This approach is used to measure other sectors of Manitoba's economy and is in use in other provinces to measure one form of the economic impact of international students.

Section V

THE REPORT ON INTERNATIONAL STUDENTS IN MANITOBA 2000/01

APPENDIX

PARTICIPATION INSTITUTIONS

The following is a list of educational institutions that responded to the international student survey. Not all institutions appear in the body of the report as some simply indicated that they were not involved in the field of international education.

Universities and Colleges

Brandon University

Canadian Mennonite University

Collège universitaire de Saint-Boniface

Collège universitaire de Saint-Boniface– L'École technique et professionnelle

Providence College and Seminary

Red River College

University of Manitoba

The University of Winnipeg

Schools and School Divisions

Antler River School Division

Balmoral Hall School

Fort Garry School Division

Fort La Bosse School Division

Garden Valley School Division

Interlake School Division

Kelsey School Division

Lakeshore School Division

Leaf Rapids School Division

Lord Selkirk School Division

Midland School Division

Morris MacDonald School Division

River East School Division

Souris Valley School Division

St. James-Assiniboia School Division

St. John's-Ravenscourt School

St. Vital School Division

Transcona-Springfield School Division

Turtle Mountain School Division

The University of Winnipeg Collegiate

Whiteshell School Division

Winnipeg School Division

English as a Second Language Schools

Applied Linguistics Centre

Providence College and Seminary

University of Manitoba – English Language Studies

Brandon University

Red River College

University of Winnipeg English Language Program

Heartland International English School

University of Manitoba – English Language Centre

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